

"The road is made by walking..."

A case study of learning, knowledge creation and knowledge sharing
at The Valley Trust, a South African NGO

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DECLARATION

I, CLIVE ANTHONY BRUZAS declare that:

- (i) The research reported in this dissertation, except where otherwise indicated, is my original work;
- (ii) This thesis has not been submitted for any degree or examination at any other university;
- (iii) This thesis does not contain other persons' data, pictures, graphs or other information, unless specifically acknowledged as being sourced from other persons;
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- (vi) This thesis does not contain text, graphics or tables copied and pasted from the Internet, unless specifically acknowledged, and the source being detailed in the dissertation and in the References sections.

Signed:

Submitted in fulfillment of the requirements of the degree of Doctor of Philosophy in the School of Sociology and Social Studies, University of KwaZulu-Natal, Pietermaritzburg.

Abstract

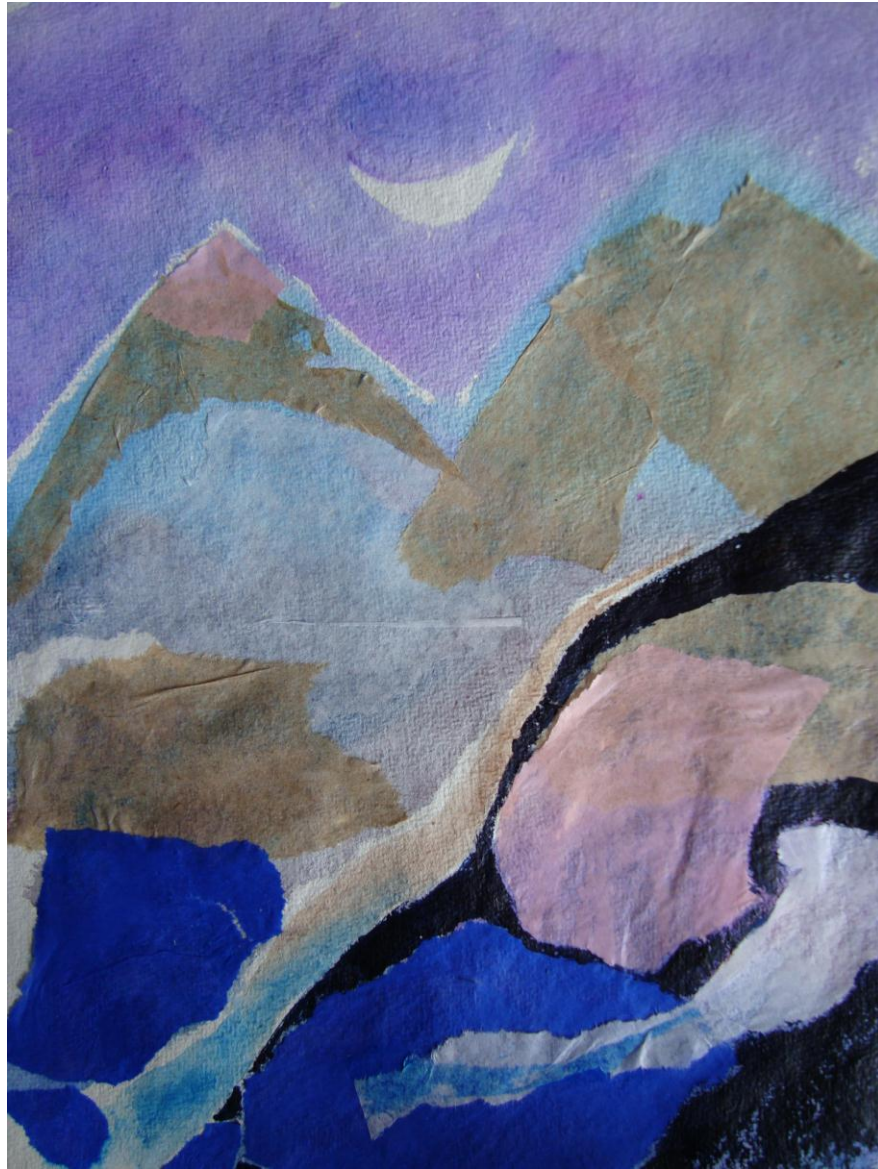
This thesis explores, from a very personal perspective, the engagement of one South African non-government organization, The Valley Trust, with knowledge work as an integral dimension of its practice. The thesis is written as an autoethnographic case study, drawing on the complementary methodologies of writing inquiry and arts-based inquiry, including the use of metaphor as an aid to understanding learning and knowledge creation as ongoing flow and movement. It is also strongly influenced by narrative theory, and it incorporates participatory action research, with a cooperative inquiry group made up of 12 colleagues playing a key role.

Although the inquiry set out to address the question: *How can The Valley Trust integrate its learning processes and its knowledge creation and sharing so as to improve its effectiveness and contribute to the broader discourse around health and development?*, what emerged during the inquiry process was that there are no simple answers to this question, and confirmed that within the context of the organization's work and the author's lived experience, knowledge is indeed a "...process, a temporary state...scary to many" (Eisner, 1997:7). For this reason, and to honour the importance of the co-creation of meaning which was a key theme in the inquiry, the thesis avoids conclusions and relies rather on the reader's engagement with the process as represented in the text and the images to allow meaning to emerge. The thesis also creates spaces for multiple voices to be heard, although not to the extent originally intended.

The thesis foregrounds those dimensions of knowledge work which are neglected in many other writings on the subject: the practical difficulties of finding organizational time for conversation, reflection, and the co-creation of meaning; the challenges introduced by organizational change processes; the tensions which inevitably occur between colleagues; and the challenges of promoting a shared understanding of knowledge work and its significance in an organization where multiple paradigms help to determine priorities. Other key themes which emerged during the inquiry were the importance of seeing

knowledge work within the context of the whole organizational landscape rather than as an isolated component of the organization's practice, and the critical importance of locating knowledge creation and sharing in relationship.

The thesis closes with a reflection on the process of writing, emphasizing the primacy of process in knowledge work, and recognizes the challenges confronting the representation and sharing of knowledge work as process in the complex context of an organization working in the fields of health and development.



"The road"

Mixed media: water colour, acrylics, collage. (Clive Bruzas, 17th May 2009)

*Wanderer, your footsteps are
The road, and nothing more;
Wanderer, there is no road,
The road is made by walking.
By walking one makes the road,
and upon glancing behind
one sees the path
that never will be trod again.
Wanderer, there's no road,
only wakes upon the sea.*

Antonio Machado
(translated by Betty Jean Craige¹)

¹ I describe in Chapter 4, page 147, how this poem came to be such an important part of my research process, but here I would like to say that the above translation (available at <http://www.cha.uga.edu/bjc/machado.htm>) is slightly different from the one I worked with during my research. While searching for the poem on the internet I found a number of versions, but preferred the one above. However, I struggled to understand the meaning of "wakes" in the context of the poem. When I found another version which substituted "foam trails" for wakes (<http://blog.gaiam.com/quotes/authors/antonio-machado>), my mind combined the two and I ended up with a version in which the last two lines became "Wanderer, there's no road/only *waves* upon the sea". When I later found yet another version (at <http://www.spiritualityandpractice.com/books/excerpts.php?id=15491>) in which the last line read "only a ship's wake in the sea", I realized that the "correct" translation was indeed "wakes", not "waves". Although the word "waves" became important in my process of making meaning (and I still find that the word works for me in the context of my research), I include what appears to be the commonest translation here for clarity.

Contents

	Page number
Declaration	ii
Abstract	iii
Painting: "The road" by Clive Bruzas	v
Poem: "The road" by Antonio Machado	vi
List of contents	vii
List of drawings, prints and paintings	ix
List of diagrams and photographs	x
Acknowledgements	xii
Chapter 1: Introduction	1
Chapter 2: The organizational landscape	17
Chapter 3: The dance	38
Chapter 4: The road	144
Chapter 5: The labyrinth	179
Chapter 6: A writing story	209
Appendix 1: A note on my attempts to gain permission to copy music for the electronic version of the thesis	219
Appendix 2: The Valley Trust's guiding statements	224
Appendix 3: First writing, 18 th May 2007	226
Appendix 4: The Valley Trust's knowledge work strategy, version 5	242
Appendix 5: The five competencies matrix	257
Appendix 6: The Valley Trust's monitoring and evaluation guidelines	260

Appendix 7: Primary data sources

263

References:

265

List of drawings, prints and paintings

The drawings, prints and paintings are all my own work, and formed an integral part of the arts-based approach to making meaning which I used during my research.

	Page number
Introductory section:	
"The road": mixed media painting	v
Chapter 3:	
3.1 "Knowledge lives in relationship": pen sketch	64
3.2 "Knowledge lives in relationship": pastel drawing	65
Chapter 4:	
4.1 "The crossroad": charcoal drawing	144
4.2 "Road and trees": monotype triptych	149
4.3 "Coastline": watercolour painting	170
4.4 "The road": mixed media painting	173
4.5 "The next bend in the road": monotype	218

List of diagrams and photographs

Page number

Chapter 1:

- | | | |
|-----|---|---|
| 1.1 | Photograph: Clive monitoring pheromone traps in a cotton field | 4 |
| 1.2 | Photograph: Clive talking to visitors in The Valley Trust's Ecology Education Unit during the early 1980s | 6 |

Chapter 2:

- | | | |
|-----|---|----|
| 2.1 | Diagram: the iceberg model of development | 27 |
| 2.2 | Diagram: the first appearance of the figure of eight diagram, as conceived in 1999/2000 | 27 |
| 2.3 | Diagram: the garment diagram | 31 |

Chapter 3:

- | | | |
|-----|---|-----|
| 3.1 | Diagram: the figure of eight diagram in current use at The Valley Trust | 48 |
| 3.2 | Diagram: the knowledge management pyramid | 57 |
| 3.3 | Diagram: the proposed role of the Monitoring, Evaluation and Research Division, superimposed on the action learning cycle | 125 |
| 3.4 | Diagram: The Valley Trust's diagram to show the integration of its three Divisions | 134 |
| 3.5 | Photograph: Clive Bruzas and Nhlanhla Vezi at the All Staff meeting, 27 th June 2008 | 140 |
| 3.6 | Photograph: Nhlanhla Vezi presenting at the All Staff meeting, 27 th June 2008 | 140 |

Chapter 5:

- | | | |
|-----|---------------------------|-----|
| 5.1 | Photograph: the labyrinth | 180 |
| 5.2 | Diagram: the labyrinth | 196 |

Appendix 2:

A2.1	Diagram: the figure of eight diagram currently in use at The Valley Trust	230
A2.2	Diagram: the knowledge management pyramid	232
A2.3	Diagram: the adapted knowledge management pyramid	234

Annexure 2 to Appendix 4:

A4.1	Diagram: the figure of eight diagram currently in use at The Valley Trust	254
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Chapter 1: Introduction

The question we are asking is, 'why are we doing research in the first place?' What are we seeking to know (understand)? Let me ask, instead of research mastering us, shouldn't it open up possibilities to us for what matters most to our existence, or better, to our way of being-in-the-world? But in fact, our way of knowing-about-the-world has produced a faulty engagement with reality, one that is replete with tensions between representations that reduce and simplify relations between people and phenomena. So, if former ways of explaining reality have subjugated us in our world, falling short of describing relations in dynamic terms, then are we not morally obligated to search for legitimate ways of apprehending our world in closest relation to where we experience living? (Daley & Wiebe, 2002:1)



Let me start with a story, which I'm sure is told in many different versions.² This is my version:

Once upon a time there was an old, wise man, who was invited by the elders of a village to address their people. On the appointed day, the wise man stood up in front of the crowd and asked "Do you know what I am going to tell you?" The villagers looked at each other in bewilderment and answered "No." "Then," said the wise man, "I have nothing to say, because you can only learn what you already know." And he left.

This caused considerable consternation in the village, and the elders resolved to invite him back. So on the appointed day he again stood up and asked the crowd "Do you know what I am going to tell you?" This time the crowd answered "Yes!" "In that case," said the wise man, "you don't need me." And he left.

² I first heard a version of this story told by Dr Jodi Kretzmann, who facilitated a leadership module during the Community, Higher Education, and Service Partnership programme (CHESP) in 1999 (and I'll say more about CHESP later in this chapter). I have also read another version in a book of stories about the Mulla Nasrudin (Shah, 1966:44)

At this point the village elders felt acutely embarrassed, and decided to invite the wise man back for a third time, but this time they would be prepared. So on the appointed day the wise man stood before the villagers and asked "Do you know what I am going to tell you?" This time, half the crowd shouted "Yes!" and the other half shouted "No!" "In that case," said the wise man, "the half of you that know tell the half that don't." And he left.

I have chosen to start with this story because through my research into learning, knowledge creation and knowledge sharing at The Valley Trust, I have come to realize that I, too, tend to learn what I already know, and I find it fascinating to observe how what I think I know can change, how what I call my knowledge³ forms, hesitates, dissolves and then takes on a new shape. I can't say how it is for others, but that's how it is for me.

Sometimes the changes occur slowly, so slowly that I fail to observe them until I realize that what I thought I knew doesn't work any more. Sometimes the changes occur with shattering swiftness, so swiftly that within a moment I realize that what I thought I knew and was comfortable with has changed forever.⁴

Does this bother me? It used to. Eisner (1997:7) points out that "*We prefer our knowledge solid and like our data hard. Knowledge as process, a temporary state, is scary to many.*" But lately I find myself welcoming the fluid nature of knowledge, its uncertainty and its mystery. That's not to say that I always find it comfortable, but it does create different spaces and dynamics which can be explored and played with and out of which something new

³ As my thesis unfolds, I will reflect on the terms "knowledge", "knowing", and "learning" because, as Hildreth and Kimble (2002:1) observe, "*It is clear from looking at the literature on knowledge management (KM) that the term knowledge suffers from a high degree of what might be called 'terminological ambiguity' and often requires a host of adjectives to make clear exactly in what sense it is being used.*"

⁴ In the electronic version of this thesis, click on the folder labeled "Shostakovich" to hear a recording of his string quartet no. 10 in A flat major - a strange, unsettling piece of music which for me evokes a similar sense of unpredictable movement and change as that which I experience in knowledge work. I have included a copy of this quartet (along with another piece of music) in the electronic version, after striving unsuccessfully to obtain permission from the publishers (see Appendix 1 for details). However, my understanding is that the inclusion of recordings is acceptable for academic purposes and constitutes one form of "fair use".

may emerge. Paradoxically, that can be both unnerving and reassuring - and I think that it increases my freedom.

For readers to engage fully with the way in which I have written this thesis, I need to explain how I became interested in knowledge and learning and what I have come to call "knowledge work."⁵ It is difficult for me to identify the origins of my interest, but I do clearly remember my youthful fascination with "learning things" which, now that I look back on it, equated to accumulating facts. The more facts I knew, the better, and I soon realized that my academic worth would be judged according to how well I could represent these facts in an examination, either theoretical or practical. One of my strongest recollections of high-school was the anxiety produced by my abysmal performance in mathematics, as testified to by the F symbol which regularly appeared on my report card; fortunately I could allay this anxiety to some extent by carefully changing the F to an E, which reduced the intensity of my father's criticism but at the same time made me feel guilty about the misrepresentation of my knowledge. Thus I discovered early in life that there is an artificial border line between knowing enough and knowing just too little, and it may be as fine and as fragile as one small stroke of a pen.

My understanding of knowledge did not change that much as an undergraduate at university, where I earned a BSc Honours degree in entomology by knowing just enough to tell the difference between the various orders of insects,⁶ how they behaved (*"We have to take a mechanistic approach to animal behaviour because we cannot know what the animals think and feel"*), and how they interacted with their environments (*"stimulus-response, stimulus-response"*). Now I look back on it and wonder why I found biology so rewarding,

⁵ I use the term "knowledge work" in preference to "knowledge management" because for me it better describes my understanding of knowledge as a temporary state and the reality (again, for me) that although I can engage and work with knowledge, I cannot really manage it in any meaningful sense as opposed to data and information, which I can manage.

⁶ Some insect orders were poorly represented in my collection: I could never bring myself to kill butterflies and praying mantises, and I agonized over killing beetles, which moved for hours in the killing jar before they died. I now seriously doubt that this was a necessary part of learning about insect taxonomy.

but at the time I fantasized about a glittering career based on my research into the simple lives of insects.

I set about building the foundations of that career with the Department of Agriculture's Plant Protection Research Institute, where I specialized in researching the use of sex pheromones to estimate the size of American Bollworm populations on cotton crops. Thanks to the wonders of capillary gas chromatography, I knew the composition of the pheromone, and could count the number of male moths which, lured by the false promise of a synthetic



Clive monitoring pheromone traps in a cotton field, *circa* 1981.
(Photographer unknown)

pheromone, ended their lives stuck to the walls of sticky traps. There was even a mathematical formula which calculated the distance over which male moths would respond, based on wind strength and direction and the various components of the pheromone. However, what I didn't know at the time was that there was no fixed relationship between the numbers of male and female moths in a field, so the number of male moths caught in the traps could not be used to reliably estimate the number of female moths, and consequently the number of eggs laid and larvae hatched could not be estimated and the need to spray pesticides could not be predicted.

From one perspective I had wasted five years of "research" because I had assumed a simple linear relationship and never thought to question that. From another perspective I had started to learn an important lesson: life is complex, and cannot be easily reduced to numbers and mathematical formulae.

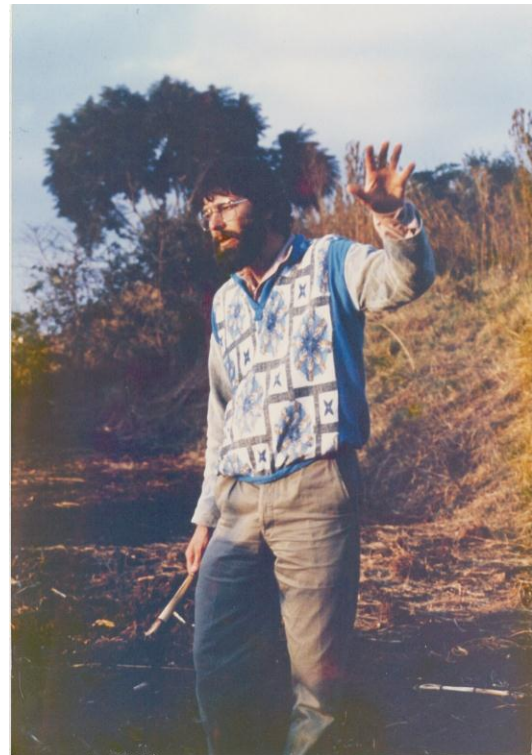
During this period, my interest in what I can best describe as "ecology" was reawakened after its university-induced sleep. How did this happen? No doubt in complex ways, but

while my head was being stimulated by the theory of pheromones, my heart was responding to the sensuality⁷ of the area in which I was conducting my fieldwork: Rust der Winter. Here I gazed at the towering purple clouds of a Highveld afternoon; took shelter from the awesome power of the thunderstorms; and inhaled the rich smell of wet earth and bruised vegetation when the storm had passed. At night I lay in bed and listened to the owls and nightjars and crickets, and arose the next morning to dew sparkling in the early rays of the sun - the sweet-smelling promise of a new day. I suppose that what I was gradually experiencing was the dim realization that my head was giving me one view of the world and my heart another. This realization gradually grew to the point where my wife, Anne, and I realized that we could no longer continue working in the environment offered by the Department of Agriculture; we needed to move on in search of something, but at that stage we were not sure of a destination. As it turned out, I took a job as technician in the Horticulture Department at what was then the University of Natal, but as I have described this interlude in some detail elsewhere (Bruzaz, 2004), I will merely state that the experience strengthened my growing conviction that there must be far more to knowing than the accumulation of information and the relatively thoughtless application of that information in practice. After less than a year I left the University to join The Valley Trust as Natural Resources Officer, and although my roles and responsibilities have changed considerably, I have remained with the organization for 26 years.

I will describe The Valley Trust at length in the next chapter, but let me say for now that the organization is an Not for Profit Organization (NPO) founded in 1953 as a socio-medical project for the promotion of health, and that the organization's recognition of the complex nature of the contexts into which it intervenes has required a holistic approach. When I joined The Valley Trust, my work was to promote a deeper organizational understanding of the relationships between health and the environment, and this extended

⁷ Here I am using the word "sensuality" in the sense in which it is used by Abram (1996), who points out (p. ix) that *"For the largest part of our species' existence, humans have negotiated relationships with every aspect of the sensuous surroundings, exchanging possibilities with every flapping form, with each textured surface and shivering entity that we happened to focus upon."*

to engaging with students, particularly from the health sciences, who visited the organization. In order to make our environmental work as relevant as possible, we maintained a 25 acre piece of land known as the Ecology Education Unit, and my almost daily exploration of this small area strengthened my growing ecological consciousness. Around this time I was strongly influenced by several writings on ecological and "alternative" themes: one was *"Thinking like a mountain"* by Seed *et al* (1988); another was *"Deep ecology"* by Devall and Sessions (1985); a third was the poetry of Gary Snyder (1974). I mention these writings here because they represent my first exposure to a way of seeing the world from a paradigm very different to the one out of which my formal education had been fashioned, and because of the importance which working with paradigms was to assume for my work from the late 1990s. These authors also emphasized the profound importance of relationships, and as I will explain later in this thesis, I have come to believe that knowledge lives in relationships, be it relationships between people, or relationships between people and their environments. In this sense, the influence of these authors also foreshadowed the influence that authors such as Peter Reason, John Heron, and Henryk Skolimowski would have on my thinking.



Clive talking to visitors in The Valley Trust's Ecology Education Unit during the early 1980s. (Photographer unknown)

Much as I think that my worldview was changing during these early years at The Valley Trust, it wasn't until 1999 and the advent of the CHESP⁸ programme that my view of

⁸ The Community, Higher Education, and Service Partnership Programme was a national programme to contribute to the reconstruction of civil society, coordinated by the Joint Education Trust and funded by the Ford Foundation. My role as service partner for the CHESP Durban campus Core Group was the subject of my dissertation for my Master of Commerce degree (Bruzas, 2004).

knowledge and learning underwent a fundamental shift. Central to this shift was my exposure to the work of Prof Richard Bawden, who facilitated one of the CHESP leadership development modules, and whose influence I shall return to later in my thesis. During his module, he introduced us to the idea of different ways of knowing: the propositional, the practical, the experiential, and the inspirational. He also shared with us his view that, for paradigm change to occur, three conditions are necessary: firstly, one must be aware of one's own paradigm; secondly, one must be aware of alternative paradigms; and thirdly, one must experience a shock big enough to precipitate a change. This idea of paradigm change significantly affected the way in which I thought about my work which, in spite of my growth in ecological consciousness, still retained elements of the knowledge-attitude-behaviour model of change. Arising largely out of this module and my Master of Commerce research, I started asking myself *"What do NGOs know? What does my organization know and how does it know it? And what do I know and how do I know it?"* It is easy for me now to look back on these early questions with a critical eye, and note that of course organizations can't know anything - it's the people who work in those organizations who "know" or perhaps better, who learn. Nevertheless, the questions were important ones because of the growing skepticism with which the work of NGOs is regarded in some quarters. Why is this?

There is growing recognition that NGOs⁹ need to become more accountable, both to the communities which they claim to serve, and to the donors who support their work (and it must be acknowledged that with regard to the latter, there is frequently an element of competition for resources). There is also a very real desire within NPOs (certainly within The Valley Trust) to know that the work we do is making a difference. Many staff members, and here I include myself, choose to work in the NPO sector because we see the

⁹ Non Government Organization. The term "NGO" was widely used during the apartheid era to describe organizations that were, in one way or another, operating in opposition to government policies of the time, or which were working to address the negative consequences of the government's policies. Since the advent of democracy in 1994, the term has been replaced by "NPO" or even Public Benefit Organization (PBO), but for those of us who have worked in the sector for many years, the term "NGO" is still in common use.

potential for contributing to "the greater good", for contributing to what Reason and Bradbury (2001:1) have referred to as *"A world worthy of human aspiration."* However, there is also a growing realization that we may not be achieving the results we would like. Writing of the South African NGO sector in general, Pieterse (1998:13) pointed out that *"In real terms, the contributions and role of NGOs are relatively inconsequential to the everyday existence of the 53 percent of the South African population (approximately 20 million people) below the poverty line"*, and Edwards and Hulme (1996:5) state that *"...there is increasing evidence that NGOs and GROs¹⁰ do not perform as effectively as had been assumed in terms of poverty reach, cost-effectiveness, sustainability, popular participation (including gender), flexibility, and innovation."* These views are sobering for many of us who work in the sector, and demand a response. It was in the process of attempting to find this response that I came to the key question guiding my research: *How can The Valley Trust integrate its learning processes and its knowledge creation and sharing so as to improve its effectiveness and contribute to the broader discourse around health and development?*

I have spent some time describing how I came to this research because of its importance to me at this stage of my life. In January 2010 I celebrated my 55th birthday, which sees me moving toward the close of one seven year phase (49 to 56) and the start of the next (57 to 63). These seven year life phases are, according to Van Houten (1995), significant, and he describes these particular two as follows (pp. 124-126):

From 49 to 56 years of age... We keep learning all the time. At the age of 49 we have acquired many talents and skills and have experienced a great deal. It seems as if we have exhausted all our possibilities. Further development now depends on a kind of sacrifice, entailing renunciation. We have to be able to give up something of what we have achieved to create an inner space. This is so that we can discover something new, in the form of an unresolved question in the world we meet. There are innumerable situations of this kind that involve hidden questions. With traditional skills and knowledge, they can be neither comprehended nor solved. To be able to perceive these needs of the world, is the beginning

¹⁰ Grass Root Organizations.

of a new learning process that may develop new faculties... This biographical transition is the source of creativity in the latter part of life.

From age 56 to 63 years of age... Because we become increasingly independent of the influence of our bodily organism, the spiritual up-building becomes increasingly possible. The outward creativity then results from an inner rejuvenation... Particularly in the sixties, the review and evaluation of our life history is a wonderful learning process that may shed new light on all our experiences. The most unpleasant in particular, as well as the most joyful events, may prove to be of great significance for our Destiny Learning.

My research, then, has my own path of learning at its centre, but it is my path of learning as it is intimately interwoven with the path of the organization to which I have devoted 26 years of my life. For this reason, I have chosen an autoethnographic approach to my research.

Patton (2002:84) stated that autoethnography is *"...the latest and still emergent approach..."* in the qualitative tradition, and gives the foundational question for autoethnography as *"How does my own experience of this culture connect with and offer insights about this culture, situation, event, and/or way of life?"* As I have outlined above, I see my quest to understand my own ways of knowing as intimately connected (but obviously not limited to) the organizational context in which I spend most of my waking life, so the possibilities of autoethnography resonated strongly with me when I was seeking an appropriate approach for my research. Indeed, I now think that I was already using this approach in my work, and what my initial inquiries did was provide a name for it. Patton goes on (p. 85) to list 30 additional terms which can be applied to *"...support this emergent frontier of qualitative inquiry and to confuse exactly what it is."* Amongst these terms are *evocative narratives, first-person accounts, interpretive biography, and personal narratives*, and in my fifth writing,¹¹ I alluded to the importance of the personal when I noted that *"I have chosen an autoethnographic approach to this study because, in my view,*

¹¹ I will describe the series of writings which I created as part of my research process later in this chapter. They form one of my sources of primary data, and are listed as such in Appendix 7.

the personal and the professional (for want of a better term) are so intertwined in my life that they cannot be separated in any useful way" (Fifth writing, February 2008:3).

Two of the most prominent advocates of the autoethnographic approach are Carolyn Ellis and Arthur Bochner, and in my research I have drawn extensively on their overview of the approach (Ellis & Bochner, 2000). In this article, they observe (p. 739) that

*Autoethnography is an autobiographical genre of writing and research that displays multiple layers of consciousness, connecting the personal and the cultural. Back and forth autoethnographers gaze, first through an ethnographic wide-angle lens, focusing outward on social and cultural aspects of their personal experience; then, they look inward, exposing a vulnerable self that is moved by and may move through, refract and resist cultural interpretations. As they zoom backward and forward, inward and outward, distinctions between the personal and the cultural become blurred, sometimes beyond distinct recognition. Usually written in first-person voice, autoethnographic texts appear in a variety of forms - short stories, poetry, fiction, novels, photographic essays, personal essays, journals, fragmented and layered writing, and social science prose. In these texts, concrete action, dialogue, emotion, embodiment, spirituality, and self-consciousness are featured, appearing as relational and institutional stories affected by history, social structure, and culture, which themselves are dialectically revealed **through action, feeling, thought, and language.***

I have included this lengthy quote because it summarizes much of what I have included in my research process:

- Firstly, in creating the text, I have drawn on what Richardson (2000:929) refers to as "*creative analytic writing practices*" (CAP). Inherent in this method is the fact that writing is both a means of representing one's research (writing as product), as well as an integral aspect of the research itself (writing as process) - knowing through writing. Richardson emphasizes (p. 930) that "*CAP ethnography displays the writing process and the writing product as deeply intertwined; both are privileged. The product cannot be separated from the producer or the mode of production or the method of knowing.*"

Thus I have, during the course of my research, produced nine writings in which I

attempt not only to document the research process, but also to write in a way that encourages insights to emerge from the writing process. I have referenced these writings in this thesis as "First writing, May 2007", "Second writing, June 2007", etc, and include them in my list of primary data sources. In creating these writings, I have been mindful of the dangers of "*substituting novelty and cleverness for substance*," as Eisner (1997:9) expresses it, so I have also attempted to honour the standards which Richardson suggests for CAP (p. 937):

1. Substantive contribution: *Does this piece contribute to our understanding of social life? Does the writer demonstrate a deeply grounded (if embedded) social scientific perspective? How has this perspective informed the construction of the text?*
2. Aesthetic merit: *Rather than reducing standards, CAP ethnography adds another standard. Does this piece succeed aesthetically? Does the use of creative analytic practices open up the text, invite interpretive responses? Is the text artistically shaped, satisfying, complex, and not boring?*
3. Reflexivity: *Is the author cognizant of the epistemology of postmodernism? How did the author come to write this text? How was the information gathered? Are there ethical issues? How has the author's subjectivity been both a producer and a product of this text? Is there adequate self-awareness and self-exposure for the reader to make judgments about the point of view? Does the author hold him- or herself accountable to the standards of knowing and telling of the people he or she has studied?*
4. Impact: *Does this affect me? Emotionally? Intellectually? Does it generate new questions? Move me to write? Move me to try new research practices? Move me to action?*
5. Expression of a reality: *Does this text embody a fleshed out, embodied sense of lived experience? Does it seem "true" - a credible account of a cultural, social, individual, or communal sense of the "real"?*

In addition to drawing on the nine writings which I have created during my research, I have also drawn on the notes which I have made in the journals which I have been keeping since 1985. These journals are also noted in my list of primary data sources. The contents of my journals are often unpolished, sometimes raw, and are a collage of writing, drawings, photos and found objects, and by including extracts of all these I hope to reveal something

of my emotions and my interpretations of events soon after they occurred. Another form of writing with which I have experimented during the course of my research has been the nine word poem, arranged in five lines, as described by Matthews (1994:149). For example:

*What
do I
know? Only the
ever changing
flux.*

Why poetry? Poetry can help both the writer and reader to experience life in different ways, in hopefully deeper and richer ways. Furman (2006:561) suggests that "*The expressive and creative arts seek to expand understanding, present subtle ideas that might even be paradoxical or dialectic, and lend themselves to the study of that which is difficult to reduce,*" and adds that

Poetry is a particularly powerful tool for achieving this aim. For thousands of years, poets have used the medium to explore and express the important truths of their hearts and their experiences of existence. Poetry often has the capacity to penetrate experience more deeply than prose.

Where extracts from my journals appear in this thesis, they are referenced as (Journal: date).

Thus in this thesis (the product) I am striving to make my writing-as-inquiry process visible. But more than that, I hope to write in a way that represents the process of knowledge creation as I am coming to understand it both within myself and at The Valley Trust, its tentative, flowing, often paradoxical, nature. Because I have also come to believe that knowledge lives in relationships, I hope that my writing leads to a living relationship with my readers, one which does not see them as passive recipients of this "product", but rather as engaged co-creators of meaning (Reason, 1998a). In attempting this, I acknowledge that at times my writing may seem unpolished, unfinished even. This is intentional, as sometimes I wish to leave some things unspoken, or merely hinted at, to

leave a space¹² for new questions to arise, or to allow the reader the opportunity to make his or her own interpretations, or simply to resist closure. With regard to this latter point, Eisner (1997:8), has observed that *"Unlike the traditional ideal of conventional research, some forms of data representation result in less closure and more plausible interpretations of the meaning of the situation,"* and Pigrum and Stables (2005) have suggested the need to find ways of keeping knowledge "open" and, in a sense, never final or complete; they employ the German term *"gegenwerk"* to describe a process of *"...work toward the finished work but also the work that is in opposition to the closure of the completed work."*

- Secondly, I have included photographs (some of them faded with time), to evoke in the reader a sense of the times, places, and people I am writing about. Eisner (2001:136) describes how

...qualitative researchers pay careful attention to highly nuanced qualities in both their uptake and their output, they are focused on cases, that is, on the particular; they use forms of communication that are intended to do more than tell, but to show, that is, to convey a sense or feeling of person or place. Qualitative research has much to do with making vivid what had been obscure.

- Thirdly, in addition to the photographic images I have included a variety of diagrams, drawings, and prints which I have created as part of my use of arts-based methods. While the term "arts-based" includes creative writing, it extends beyond that to non-linguistic forms of inquiry such as drawing, sculpture, and dance. Finley (2003) has sketched the emergence of arts-based inquiry and drawn attention to the fact that a tension has arisen between those who argue for standards by which arts-based inquiry can be judged, and those who claim that an emphasis on standards will re-introduce the very rigidity that a turn to the arts attempted to transgress. I make no claim to being an accomplished artist, and see my use of arts-based methods as a way of entering what Bawden (1999:9) refers

¹² Milloy (2005:546-547) notes that *"In writing, the self folds around absences, literally, shapely words, lines curving around space on the page, space that contains nothing, yet reveals something, in the movement of writing."*

to as the *"inspirational learning subsystem."* I will elaborate on this much later in my thesis, but for now let me simply say that I hope my inclusion of an artistic element will take readers to places within themselves which they might not normally explore in the context of research. Such journeys can introduce a strong sense of ambiguity, but as Eisner (1997:8) points out

...alternative forms of data representation can provide what might be called "productive ambiguity." By productive ambiguity, I mean that the material presented is more evocative than denotative, and in its evocation, it generates insight and invites attention to complexity. Unlike the traditional ideal of conventional research, some alternative forms of data representation result in less closure and more plausible interpretations of the meaning of the situation.

- Fourthly, the action dimension is prominent in my research. My research is an inseparable and ongoing part of my life, and as such is intimately linked to my thinking, my feeling and my doing, and much of what I do, I do in the context of my work (or, in the words of the quote which opens this chapter, *"...in closest relation to where [I] experience living."* Again, with action research, the personal is an accepted dimension; Chandler and Torbert (2003:134) observe that *"...action research aims not only to understand past events, but also present phenomena, particularly the ongoing dynamics of human interactions in which one is a participant, as well as future intentions and the forward design of joint organizing."* Of the different varieties of action research, I had hoped that my research would take the form of *participatory* action research (PAR), and in Chapter 3 I will describe how I set about initiating a cooperative inquiry group. However, the participatory aspect has not developed as strongly as I would have liked, and I will explore this later in my thesis.

And lastly, while this is not included in the quote from Ellis and Bochner above, my research is a case study, which Stake (2000:437) points out *"...is not a methodological choice but a choice of what is to be studied."* He adds that, *"As a form of research, case study is defined by interest in individual cases, not by the methods of inquiry used."* Stake

distinguishes between three types of case study: the *intrinsic case study*, in which insight into the one particular case is desired; the *instrumental case study*, which is researched to gain deeper understanding which can be generalized; and the *collective case study*, in which a number of cases are studied jointly to explore a "*phenomenon, population, or general condition*" (p. 437). My study is an intrinsic case study, given that I am researching one aspect of one particular organization, The Valley Trust. As such, I make no claim to the generalizability of my findings in the traditional sense, although Ruddin (2006:804), drawing on Stake's work, suggests that

...what is required of case study researchers is not that they provide generalizations but rather, that they illustrate the case they have studied properly, in a way that captures its unique features.

Ruddin goes on to suggest (p. 805) that "*...it is the receiver of the information who determines the applicability of a finding to a new situation.*" While I welcome the idea that my findings might resonate with the experience of some of my readers, and that they will draw on my work in their meaning-making processes, I tend to agree with Flyvbjerg (2006:224) when he states that

Predictive theories and universals cannot be found in the study of human affairs. Concrete, context-dependent knowledge is, therefore, more valuable than the vain search for predictive theories and universals.



In closing this first chapter, let me say that I have merely touched on the case which I have researched (*learning, knowledge creation and knowledge sharing at The Valley Trust*), and sketched the methodologies which I have used. I will elaborate on these in the chapters which follow. My main concern in this introductory chapter has been to provide some guidance as to the form of my thesis, so that the reader may engage with it in a way that allows new meaning to emerge. I am describing my experience of my particular context, and what meaning I have made of that. But each reader will bring their experience

to what I am describing, and hopefully my experience will resonate with them, raise new questions for them, and excite them. These are all part of Richardson's criteria, listed on page 11, in terms of which I hope my work will in part be viewed.

Chapter 2: The organizational landscape

Our narratives, be they life stories, autobiographies, histories, sciences, or literature are the tales through which we constitute our identities. We are our narratives. (Hendry, 2007:495).

My story is not a sequence of events like knots on a string...all of it happens at once and it goes on happening; all of it is happening now and any part of it contains the whole of it, the pictures needn't be looked at in any particular order. (Hoban, 1987:39)



If it is true that we are our narratives, then I would argue that organizations are also their narratives. In this second chapter I intend to present something of The Valley Trust's story in my own voice, as well as in the voices of some of the people who have worked for the organization. In doing so, I am conscious of the fact that we tell our stories differently at different times, for different audiences, and with different (and not always clear) intentions. Thus any story is one of many possible stories, and these stories do not necessarily exist in any simple or even sequential form.

By NGO standards, The Valley Trust¹³ is a large organization, and as Humphreys and Brown (2002:437) put it,

Large and complex organizations are characterized by multiple embedded, and sometimes conflicting, narrative identities derived from, and manifested in, simultaneously and sequentially occurring dialogues.

¹³ The Valley Trust is one of South Africa's oldest NGOs, having been founded in 1953 by Dr Halley Stott. Although our offices are located in Botha's Hill (approximately 45 km inland from Durban), we work throughout the province of KwaZulu-Natal and to a limited extent in parts of the Eastern Cape. We describe The Valley Trust as a Centre for Health Promotion, and organize our work around four themes: **health** in the context of HIV and AIDS; **power issues**, including gender imbalances; **human rights**, with particular emphasis on vulnerable groups, eg. children, and people living with disabilities; and **enabling environments** for healthy living, learning and working. Our guiding statements and a summary of our six programmes are included as Appendix 2. A full set of The Valley Trust's Annual Reports is available in the organization's Joyce Stott Memorial Library.

I will not attempt to cover the entire 57 year history of the organization, but will sketch what I have read or heard about the early years, touch on the first decade of my time with the organization, and then pick up the story in detail from 1994.

✂

It was a grey, drizzly day on 2nd February 1984 when I reported at The Valley Trust for my first day of work. I was welcomed by one of the directors, Dr Irwin Friedman, and shown to my office. During the next few weeks I would go through a rigorous induction programme,¹⁴ which involved spending time with colleagues to understand their work, meeting traditional leaders, and memorizing facts about The Valley Trust from the three most recent Annual Reports. The last part I was required to do because one aspect of my job was to run the visitors' programme, and I had to have the facts about the organization at my fingertips to be able to answer questions.

At that point in its development, the facts about The Valley Trust's work were relatively easy to grasp. As I write this, I have in front of me the Trust's Annual Report for the period 1st October 1983 to 30th September 1984, the period during which I joined the organization...

¹⁴ I find it interesting that in spite of many efforts over the past decade to put in place a thorough induction programme, we have not been able to emulate anything nearly as comprehensive as the induction which I (and others who joined around that time) experienced. Today, we offer new employees a four-day programme: one day with each of the three divisions, and one day covering policies and procedures. As I shall show in this chapter, the work of the organization has become vastly more complex over the past decade, and to my mind requires an induction programme which reflects that complexity. Regrettably, the perennial excuse of "not having the time" holds sway, and the consequence is that sometimes, newly-appointed staff members do not receive an adequate introduction to the complexity of the organization's work. However, it could also be argued that the very complexity of the work makes it impossible to cover adequately in any induction programme, no matter how well designed, and it is only through direct "hands on" engagement that new members of staff will gain the required depth of understanding.

During the 1984 statistical year, there were a total number of 77 834 attendances at the Health Centre and Sub-Centres; 50 883 at the Health Centre itself and 26 951 at the Sub-Centres...

Several papers were presented during the year...

The Nutrition Education Unit had a busy year expanding its diverse approach to nutritional problems...During the year, a total of 2 630 under five children were seen, most of these infants or toddlers. The staff of the unit saw a total of 14 098 cases in the Nutrition Education Unit and the Health Centre combined...

A total number of 28 new individual gardens were established and fenced during the year and, in addition, three new springs were fenced...Forty-three families received seeds from The Valley Trust during the year and 42 families received seedlings...

And so on...

For my part, I weighed the vegetables grown in the Ecology Education Unit, counted the number of visitors I talked to, and documented the comments of trainees. Does this sound critical? I hope not. I had found a story in/to which I felt that I was making a contribution. My narrative of that time encountered The Valley Trust's narrative of that time, and out of that mingling of narratives I started creating a new meaning for my life and work.

Many interweaving strands contributed to that meaning, but the two I would like to mention here are the historical significance and sense of belonging, and in writing about these I will first describe something of the Trust's early years as I understand them. The Valley Trust had been founded in 1953 by Dr Halley Stott, a general practitioner who had observed that residents of rural areas were frequently admitted to hospital with poor health relating to malnutrition. These patients would spend time in hospital, apparently be "cured", be discharged to return home, and then be re-admitted to hospital some time later suffering from the same ailments for which they had originally been admitted. From observing this cycle, Dr Stott found himself questioning the over-reliance on a curative

approach to health care, and came to believe that a much more promotive approach was required, one that attempted to address the root causes of ill health in the lives and environments of the patients he encountered. He further believed that if his view was to gain credibility, he would need to establish a working example of an approach that combined both curative and promotive approaches, and so in 1951 he opened a Health Centre, which was to function as the nucleus of his "socio-medical project."¹⁵ Friedman (1994:280) observes

That the Health Centre met an urgent need felt by all sections of the community was apparent from the time its doors opened. By the end of 1951, total attendances had exceeded 16 000. A channel of approach to the community had been established which provided opportunities for closer contact, study and understanding of the people and their problems. It became known as the "spearhead" of the project.

It was around this curative service that Dr Stott developed the promotive approach that was to grow into The Valley Trust. Given his conviction that good nutrition plays a pivotal role in determining a person's state of health, he incorporated nutrition education into his initiative as an early priority. However, his research into the local availability of protective foods (vegetables and fruit), revealed that shops stocked mainly refined carbohydrates: white bread, white flour, white sugar, as well as jams and other sugary preserves. He therefore added an agricultural dimension to his work, focusing largely on the production of vegetables and fruit for home consumption - he always maintained that The Valley Trust did not promote "farming". In spite of the poor quality of hillside soils in the Valley, the deep trench method of vegetable production yielded good results. Friedman (p. 282) notes that *"Productive vegetable gardens around the Health Centre, from 1952, demonstrated unequivocally that these medically recommended natural, fresh foods could be available to all Valley dwellers, regardless of economic status."*

¹⁵ When The Valley Trust was founded in 1953, it was known as a "socio-medical project for the promotion of health." This description of the organization's identity has been revised over the years, and we now describe ourselves as a "centre for health promotion."

As time passed, the work of The Valley Trust expanded. Friedman (p. 284) explains it thus:

Far-reaching as the innovative founding principles were, The Valley Trust would have stagnated had it not continued to refine some of these basic ideas and introduce new ideas from lessons being learned locally and elsewhere. Whereas the nineteen fifties and early sixties had been periods of rapid growth in ideas at The Valley Trust, the seventies saw the introduction of only a few new innovations, although the financial sustainability and reputation of the organization began to grow and many more people came to learn about its methods. In the early 1980s and for more than a decade, a two-director team led the organization and many creative ideas stemmed from this partnership. A crucial element in the success was the stress that was placed on tackling the socioeconomic factors that are causally linked to health using an approach that emphasized democratic development.

So by the time I joined the organization, Dr Stott had retired and Irwin Friedman and Chris Mann were co-directors. I certainly felt that a strong sense of history (albeit a relatively short one) permeated the organization, and I'm sure that I wasn't the only member of staff to feel inspired by working for an organization that had pioneered many of the principles of primary health care decades before the Conference of Alma Ata, which in 1978 codified those principles in the well-known Declaration of Alma Ata. And then there was the sense of belonging...I had arrived at The Valley Trust by finding out what I *didn't* want to do, and found in the organization a deep sense of purpose, a sense that I was making a difference. This is not to say that relationships were always smooth and easy; we felt passionate about what we did, and sometimes there were disagreements about our approach or our priorities that spilled over into argument. But it was always constructive argument from which we learned something and emerged richer. As part of my research for this thesis, I interviewed Irwin Friedman on 20th September 2008, and he remembered these tensions:

I don't know if you remember but it was quite...I think we use to have some quite difficult sessions, where I would be saying, you know, "we should do this" and you'd be trying to do what you could do. It was literally like a kind of supervisor-supervisee kind of tension. And it got me to think about, you know, and start reading a bit more broadly about other ways of

working and I started getting quite interested in group dynamics and how groups work.
(Interview with Irwin Friedman, 20th Sept 2008.)

Teatimes were enjoyed on the veranda, and the informal discussions about our work ensured that most staff knew what was going on in the organization which, at that time, had a relatively small staff complement.

There was also a strong commitment from Irwin and Chris to learning processes, and these took different forms. There were meetings for all staff on a Friday afternoon, during which achievements were celebrated and plans for the following week discussed. Friday mornings were reserved for meetings of MASH and CASH¹⁶; I always enjoyed these, and was surprised to discover, when I interviewed Irwin, that he didn't remember these meetings (*"What's MASH again?"*)

Irwin and Chris had very different management styles, and it was perhaps inevitable that these styles would clash and erode their partnership as directors. After a very tense period during which the differences between the two directors became increasingly apparent, the Board of Trustees decided to create a new structure, the Board of Managers, which turned out to be short-lived due to challenges relating to decision-making.¹⁷ The Board of Trustees decided that we needed strong leadership, and set about appointing someone whom they felt could bring a "missionary zeal" to the organization. They found this person in Dr Keith Wimble, who joined The Valley Trust as its fourth director in 1992.

¹⁶ These acronyms stood for Medical and Allied Section Heads (the section heads who reported to Irwin Friedman), and the Committee of Administrative Section Heads (those section heads reporting to Chris Mann.) The two groups met separately, and unfortunately this arrangement was later to become divisive when the relationship between the two directors broke down.

¹⁷ The Board of Managers was an interesting experiment, and I for one felt that it had great potential. However, at the time it was created Irwin and Chris were appointed as "consultants" and Chris was also appointed as "Group Manager" of the Board of Managers but without executive authority. This made his task extremely difficult, as no one had the authority to break the stalemates which inevitably occurred, and our skills in consensus building and group decision-making were, to say the least, under-developed.

I had a sometimes complex relationship with Keith. My first meeting with him was at teatime on the day he was introduced to staff at The Valley Trust. He came up to me, shook my hand and said: *"You must be the ecologist."* I soon realized that our views of the world were very different, and although we developed what I think was a good working relationship, there was at times a certain wariness between us. At least, that's how I experienced our relationship. I admired his commitment, and although we sometimes disagreed on approach, this was to be both a source of tension and of innovation in the organization, as I shall describe shortly. Perhaps the thing I remember him for most was his passionate commitment to building people's capacity: he encouraged and supported attendance at conferences and workshops, as well as both formal and informal studies. He is one of the very few people who actually read my Master of Commerce dissertation (and referred to parts of it on different occasions), and encouraged me to pursue my Doctoral studies. Keith also sent me to England twice, once to visit organizations involved in environmental issues, and once to attend a course on impact assessment. He also sent me to Denmark in 1996 to attend a preparatory workshop for NGOs to make input into the world food summit; to Chicago to attend a seminar on partnerships for health in 1998; and to New Zealand in 2001 (with two colleagues) to present a paper on the work of The Valley Trust at a conference on community development. As I write this, I realize how much of my own development I owe to him, but at the same time I remember the frustration of feeling that the new ideas that I brought back into the organization were not really contributing to the changes I hoped for.

What do I mean by this? Keith brought with him to The Valley Trust a medical degree as well as a Master of Business Administration degree, and extensive experience in the business world. He stated on more than one occasion that he wanted to incorporate business principles into the NGO world of The Valley Trust, and while I agree that some of the workings of an NGO can be business-like, I think that seeing an NGO primarily as a business changes its essential nature. Keith certainly wasted no time in introducing a number of changes. He felt (justifiably) that the skills of his management team could be

improved, and sent us to the University of the Witwatersrand's School of Public and Development Management for a course on "The art of general management." This was my first exposure to any formal management training, and it was also my first encounter with the work of Stephen Covey, which was to become such a significant part of The Valley Trust's changing approach. This change in approach was largely a result of Keith's desire to introduce business principles as one response to The Valley Trust's decreasing cash flow, brought about in part by changes in the external environment which were compelling the organization to seek new sources of funding. (Around 1994, many donors were adopting a "wait and see" attitude which was impacting negatively on our cash flow, to the extent that The Valley Trust had to retrench a number of staff.) However, it was also an opportunity to review what we were doing, and to this end Keith coordinated a series of strategic planning meetings with community structures; two of these were held at a resort in the Drakensberg, and one at a hotel in Durban. Emerging from these meetings was a clear message that The Valley Trust should be doing three things:

1. Accelerating the handover of project management to community structures;
2. Strengthening the organization as a training centre for primary health care and sustainable development; and
3. Working with the transforming Department of Health to develop a model district health system for the area in which we worked.

This is not the place to describe our attempts to implement the first and third initiatives, but it is important that I describe the second, as this was the path which has led to our current organizational identity as "a centre for health promotion." In deciding to become a training centre, we opted to develop a series of modular, residential courses guided by the requirements of the emerging National Qualifications Framework. There was something about the rigidity of these requirements which repelled me, and although I was involved with the development and running of courses and could understand the need for a system which enabled life long learning, I was never really comfortable with the idea of "packaged learning." As it turned out, neither were the clients we expected to journey to The Valley

Trust to attend the courses. Far from training hundreds of people and improving our income, we discovered that people wanted more flexible training that was responsive to their daily reality, and which was offered at venues convenient to them rather than at The Valley Trust. This was the start of a period of deep questioning at The Valley Trust, and also the start of a difference of opinion in the organization, as some of us started asking difficult questions relating to what we really understood by "health", and by "development."

This questioning was further stimulated by two partnerships which became pivotal to a new way of thinking about our work. The first was NICHE, the Natal Institute for Community Health Education, which brought together community structures, service providers, and the (then) University of Natal and University of Durban-Westville, around health issues. My own involvement in this was limited to co-facilitating for three years on the Community Studies Module, a one semester programme for first year health science students, based on experiential methodologies and designed to stimulate an understanding of health and health services appropriate to a rapidly changing South Africa. I found this a valuable experience, one that deepened my understanding of primary health care, health promotion, and community-based approaches to higher learning.¹⁸

The second partnership was CHESP, and here my involvement went a lot deeper. CHESP was a national programme, not limited to the health sciences, and operating on seven university campuses around the country. I have described my involvement in CHESP in great detail in my Master of Commerce dissertation, and will not repeat that here. What *is* relevant here is the huge impact which the CHESP leadership capacity building programme had on my thinking about health and development, and on the way in which I attempted to introduce these ideas into The Valley Trust. In particular, there was the cyclical development process introduced by Doug Reeler of the Community Development Resource Association;

¹⁸ I am still involved with some of the logistical aspects of the Community Studies Module, although I no longer facilitate any of the sessions. I should also add that, in addition to introducing a very different way of learning, the programme intended to influence the way in which university courses were designed and "taught" in general.

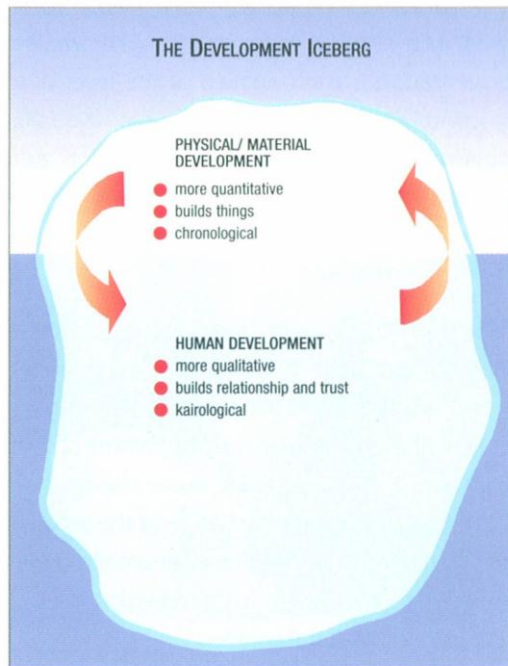
the assets-based approach¹⁹ to development introduced by Jodi Kretzmann, and the four “ways of knowing” introduced by Richard Bawden. I will draw extensively on Richard Bawden’s ideas later in my thesis, but for the moment let me say that the idea of knowing in different ways resonated deeply with my own questions about learning and knowing, and prompted me at the time to ask if there is such a thing as an “NGO way of knowing”. When, as part of my Master of Commerce research on the role of the service partner in service learning, I asked a colleague if he thought that NGOs see things in a particular way, his response was

Well, seeing things is about, really, it's something for me about complexity. The complexities of reality, that there aren't simple answers and that people do things for a reason. Whatever that reason is not to judge their reason, the fact of that is why they do what they do. And it's trying to work with that, and I think in NGOs like the way Valley Trust is developing itself. It's more and more what would put us at the leading edge of development and maybe in a way could in documentation and knowledge and that we would present things from a very balanced perspective, a very real perspective, understanding the huge complexities when we work with people, rather than just look at the small little part or that little part. (Interview conducted with a member of The Valley Trust staff on 23rd January 2004.)

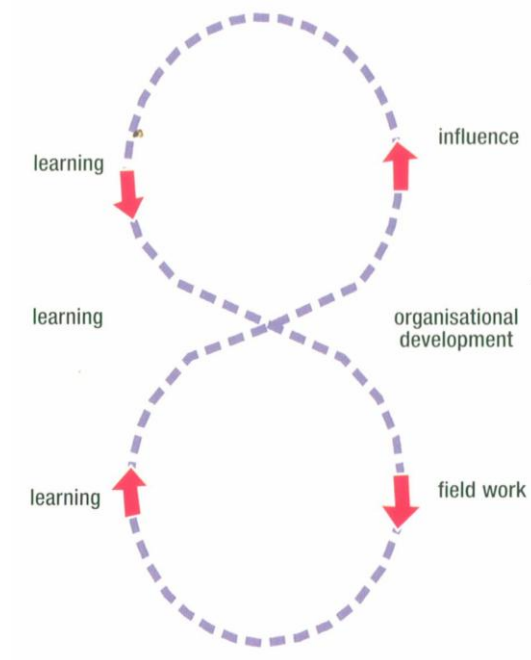
The two diagrams on the next page were included in our 1999/2000 Annual Report (The Valley Trust, 1999/2000:3-4), and illustrate my attempts to “institutionalize” some of these new ideas; the “iceberg diagram” (which was developed by the CHESP Durban core group - myself, with Frances O’Brien and Victor Mkhize) recorded a growing recognition of those human and social dimensions of development which lie (often hidden) beneath the surface. (I later re-drew the diagram, using the image of a tree rather than an iceberg.) The “figure of eight” diagram was developed in the context of my work at The Valley Trust, and was intended to illustrate the different “levels” of learning in the organization. I developed this diagram further for my Master of Commerce dissertation, and it has

¹⁹ The assets-based approach to development was actually introduced to The Valley Trust a few years before CHESP, through a video which Keith showed to the organization. However, at that time these ideas were not actively incorporated into our work.

become a more-or-less standard representation of the way I think about knowledge work at The Valley Trust. It also formed the basis of the knowledge work strategy which I introduced into the organization in 2009 - but that is the subject of a later chapter. Both diagrams were discussed with Valley Trust colleagues at the time.



The "iceberg" model of development.



An early version of the "figure of eight" diagram.

The introduction of these new ideas, in conjunction with the realization that our training was not adequately designed to meet the needs of those for whom it was intended, led to the organizational difference of opinion mentioned earlier, as a result of which two "streams of thinking" emerged in the organization: those colleagues who expressed a need to re-conceptualize our approach to health and development, and those who were content to push ahead with the conventional training and service delivery approach. This difference of opinion reached a point at which Keith decided that we could not have what amounted to two organizations working in parallel, and in 2001 asked me to head a new Department of Organizational Development to help reunite The Valley Trust. This was the start of a creative period of organizational development, during which we explored what it was we

were really trying to achieve as an organization, and culminated in the development of four "transformation statements" which encapsulated what, as an organization, we were trying to influence through our work. These were listed inside the front cover of our 2001 Annual Report (The Valley Trust, 2001) as follows:

1. To positively change people's views of their own self-worth;
2. To increase people's awareness of the opportunity base for improved quality of life;
3. To optimize intersectoral collaboration; and
4. To strengthen positive perceptions of The Valley Trust, based on quality, people-centred development work and good relationships.

These statements were generally well-received by staff and donors alike, and have survived the eight years since their introduction, although we now refer to them as our organizational "objectives" and list them in our 2009 Annual Report (The Valley Trust, 2009:1) as

1. To positively influence people's views of their own self-worth;
2. To increase people's awareness and understanding of opportunities for improved quality of life;
3. To improve the way in which different sectors collaborate; and
4. To influence the systems which impact on people's health and quality of life.

We also realized that if we were to move forward as an organization, we would need to discover a common starting point with regard to our thinking about development. Keith especially wanted clarity about the term "people-centred development" which was being heard with increasing frequency in organizational conversations, so it seemed reasonable to explore this term as a starting point. In 2002, Glen Jager joined the organization and was tasked with facilitating a "*listening process*" (Jager & Bruzas, 2006:13) that would involve all staff at The Valley Trust in surfacing paradigms about development.²⁰ The intention was

²⁰ In describing developments within the organization from 2002 to around 2006, I have drawn extensively on an unpublished (and unfinished) article which Glen and I started to write in an

"...the adoption of a single, organizational paradigm based upon a shared vision that would inform practice and behaviour of all in the organization." This listening process, which later extended to a second phase, became known as the "Development Dialogues." The process was documented in a series of internal reports, which included a review of the literature on people-centred development. In my view, the process was an admirable one, but must add that management at the time (by this I mean the departmental managers as a group) was reluctant to engage with the reports in any depth. The documents were perceived as "too detailed," "too lengthy," and there was a request for something succinct, a "one pager" that could present the findings in a nutshell. The desired one-pager was eventually written for The Valley Trust's 2004 Annual Report (The Valley Trust, 2004:15), but in reducing the richness of the dialogue reports to one page, the opportunity for engaging in depth with a topic of crucial importance to the organization was lost, and many of the tensions remained unresolved. This reluctance to engage in depth has in many ways proved to be characteristic of the organization, certainly where reading is involved, and perhaps this says something about the way in which many people in the organization engage and learn,²¹ but this is something which I have only realized much more recently, and it would be premature to discuss it at this point in my story. I should add, however, that there was also a feeling amongst some members of management that the dialogue process had been "hijacked" by staff to "air gripes about working conditions," and there was perhaps a small element of truth in this.²² However, for this reason, some managers were unable to look

attempt to document the complex changes that occurred within The Valley Trust during these five years.

²¹ This comment should not be interpreted as a critical one. Later in my thesis I shall mention the need to look beyond the conventional Western understandings of learning.

²² In our unpublished article (Jager & Bruzas, 2006), Glen and I wrote that *"We are able to see how the process could be seen as 'hijacked' by internal issues, but we are of the view that the TVT vision inextricably unites internal and external issues as indivisible. And though we understand, and share the disappointment concerning the delay in moving directly into a concentrated phase of practice development, we are equally clear that although the process was less visible than during the excitement of the dialogue phase, it remained alive and active in conversations and interactions about the work of TVT; organizational meetings; managers' OD meetings; and in partnership interactions. It was after all, only a year later that it was assigned strategic priority status in strategic planning."*

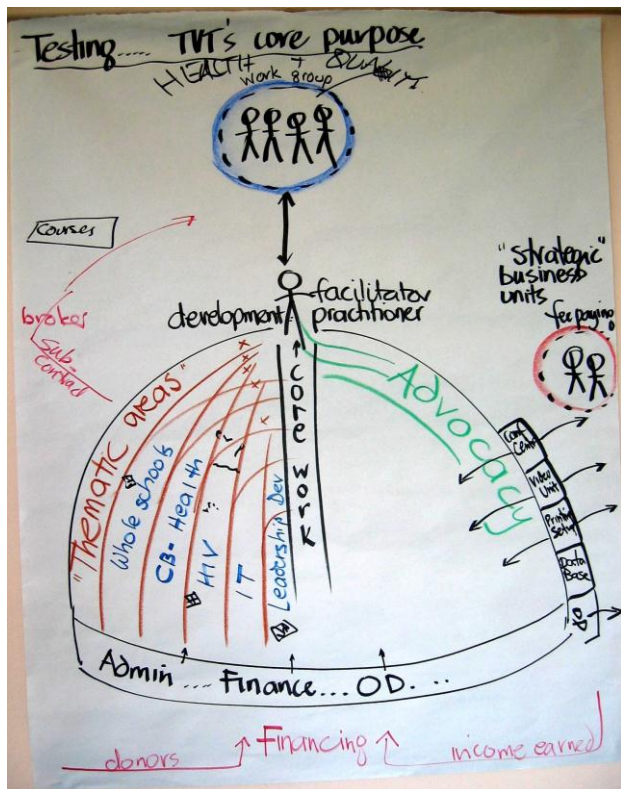
beyond those superficial and minor diversions to the heart of the reports, and therefore dismissed them as irrelevant.

The Development Dialogue process awakened a sense of anticipation amongst many staff in the organization, but it wasn't until 2004 that a renewed focus on our practice gained momentum during our strategic planning meeting. It was decided that we needed a process that would *"...include the development and formulation of a shared approach for professional practice in the organization and practitioner capacity development for effective implementation of the shared approach"* (Jager & Bruzas, 2006:16). It was also during this strategic planning that we reformulated our vision as *communities in which people take responsibility for improving their own health and quality of life within a democratic society*, and our intention as *to create processes that enable people to realize their own potential*.

The three-phase practice development process which flowed from this strategic decision was a fascinating one, to which I cannot hope to do justice in my thesis. Perhaps I will write it up some day, but I confess that already the details are fading from my memory, and what remains are the somewhat truncated descriptions of activities and decisions captured in the formal reports, the photographs of some of the exercises, and the sense of excitement (and at times frustration) that I felt during the process. The process was facilitated by an external facilitator, Davine Thaw, and one critical thing that Davine helped us to understand during the process was that we wanted to become a "professional organization": that is, we would no longer be driven by the delivery of services and products, but would work as an organization that offers *unique responses to unique situations*. Even as I write this, in November 2010, we find debates about the meaning of this aspect of our identity arising, particularly from members of staff who have joined since the practice development process; while frustrating, this has helped me to realize that no matter how clear an organization's guiding statements might be, if people haven't experienced a shared process, or at least a shared conversation, it is very difficult to co-

create meaning around any issues, especially ones as important and complex as organizational identity and approach.

But to get back to the process: another interesting development during the second



The Valley Trust's "garment diagram."

(Drawn by Davine Thaw)

workshop was that "knowledge management" emerged as an organizational issue requiring attention, and I was tasked to write and circulate a discussion document (which I did), but unfortunately it was never discussed. However, writing the document no doubt contributed to the way in which my own thinking about knowledge work developed, and for that I am grateful. During our practice development process, Davine also summarized a lot of the discussions into diagrams, and one which guided our thinking for some time was what became known as the "garment diagram" (see left.) The key realization which was represented in this diagram was that our core practice is facilitating developmental processes, and we realized that we would need to build our capacity to do that. From this realization, the facilitator development process was born.

The facilitator development process was another three-phase process, but this time was internally planned and facilitated. There was a carrying group, made up of myself, Glen Jager, Corinne Burrows, Nhlanhla Vezi, and Nondumiso Xulu (who has since left The Valley Trust), but the programme was largely facilitated by me. A group of staff members whose core work was deemed to be facilitation participated in the process, during which we

explored the art of facilitation from many different perspectives. During planning, the matter of competence was raised: how would we assess participants to know if they were competent facilitators? One way on which we decided was the use of role plays during the process. Another way was through asking each participant to create and submit a learning portfolio. In spite of several meetings to discuss portfolios, and the establishment of guidelines, only one participant managed to produce an acceptable portfolio. This perplexed me, and I struggled to understand why almost every participant struggled to represent their learnings, or only partly managed to do so. I met with several of the participants in an attempt to provide support for their portfolio development, and each seemed to experience a different "block": for some it was a struggle with the writing; for others it was a struggle to understand the nature of their learning; for at least one other there appeared to be strong emotional barriers to completing the portfolio. Again, this was a frustrating time, but it presented me with further insights into some of the difficulties associated with learning, ones which I have found recurring time and again, and which (hopefully) I now understand a little better.



Now I feel the need to bring this chapter swiftly to a close and move on, but there is one more organizational process, one more dimension to the constantly evolving organizational landscape which I must describe. After the facilitator development process "ended" - it should, in fact, be an ongoing process, especially to introduce new staff to "the way we do things" - there was a sense that it would still be difficult to work in an integrated people-centred way within the confines of a highly differentiated organization. Keith Wimble retired at the end of 2006 and was replaced by Tuki Maseatile, and it fell to Tuki to guide the organizational restructuring process during 2008, which saw three divisions²³ replacing the seven departments, as well as the introduction of a Leadership Team, made up of three divisional Senior Managers and the Executive Director. The purpose of this Leadership

²³ These three divisions are Programmes; Organizational Support; and Monitoring, Evaluation, and Research.

Team was to integrate the work of the organization at a strategic level, and I will describe something of its work in later chapters, as this has been germane to the way knowledge work has been implemented at The Valley Trust. There were other, very important, developments during the period which I have touched on in this paragraph, but because of their significance to knowledge work and to my research, they will be the subject of my next three chapters.

✂

But before closing this chapter, there are two issues I must mention. The first is to observe that, although my research into knowledge work focuses mainly on the period 2006 until 2009, with some reference to the decade before this, it should be obvious that "knowledge work" at The Valley Trust extends right back to its inception, although the various activities relating to learning and the creation of knowledge were known by other terms. When I interviewed Irwin Friedman, I asked him whether, when he joined The Valley Trust, there was a particular approach to learning, and whether it was a conscious approach. His response was clear:

I think so. You know, um...you know Halley, Halley Stott drew around him a lot of academics and as you know the, the... I mean Valley Trust in many ways is exemplary because he did a lot of good baseline work, so there was an explicit attempt to document and write things down and publish... [it was] very, very traditional which is probably not that wrong, you know, it was, it was the good old scientist who goes out there, takes notes, writes them down, perhaps puts them in a journal, does his thesis, that kind of thing. Um, it was scientific. So I think that a lot of the early...probably one of the best periods was that period when The Valley Trust started, when it was well documented. (Interview with Irwin Friedman, 20th September 2008.)

Irwin also recalled the innovative approach to knowledge sharing that was developed under Dr Stott's directorship, that of hosting "observer trainees" who would spend a week at The

Valley Trust, going out into the field with the different teams and observing their work to see which principles might be applicable to their own working contexts:

And the idea of observer trainees was Halley's idea, I mean it was definitely something he encouraged people to come and people came, it was definitely a hey day. So I think there was a lot of learning and sharing, um...in a fairly clear way, if you look at the way the Nutrition Unit was set up with its little area below where people were being taught, and the people sitting above and observing, that's a...that's still a very innovative idea. What do you call that when you, when you have a one group watching another group? You know, that little group technique, um ... fish bowl... So you know using, using... that, that hut in the demonstration garden for food...for food demonstration's practical, you know the garden itself, the demonstration garden, the whole idea of rather than just talking about it, actually having demonstrations where you could see things working. That's all to do with learning. It was very experiential. You know not, not in theory but in practice. So quite intuitively those ideas of demonstration, showing people how to do things, actually doing things, you know, the trench...you know, deep trenching. All that was very, very experiential. Going to homes, working with people, working with communities. Those were extremely powerful, I think, teaching techniques and ways of disseminating knowledge, getting people to try things out and see what they do, even using, even using a lot of indigenous knowledge. (Interview with Irwin Friedman, 20th September 2008.)

Certainly, when I joined The Valley Trust in 1984, the observer trainee programme was a regular feature of our lives, and I remember the enthusiasm which most trainee groups brought to the experience. But as our work changed, and we became more involved in the delivery of products and services, it seems to me that learning, as a *conscious* process, gradually took a back seat. I emphasize "conscious" because obviously, learning is something that we all do all the time,²⁴ but in order for it to be used as an integral part of an organization's (or an individual's) growth and development, and for it to be documented and shared, it needs to become conscious, and that is where, in my view, The Valley Trust's

²⁴ In introducing the idea of *conscious* learning at this point, I am aware of the many different definitions and models of "learning", but I will leave further discussion about the importance of consciousness for organizational learning to later chapters.

struggle with knowledge work over the past decade has been. There had been an attempt around 2002 to include a Research Office within the Organizational Development Department, and when I interviewed Keith Wimble on 30th December 2009, I asked him what he remembered of attempts to institutionalize research during his time at The Valley Trust. He commented as follows:

I think, to me, Clive, one of the apparent deficiencies in Valley Trust for a while was that we had forgotten one of Halley Stott's driving forces, which was research. And Valley Trust had been around a long time and doing lots of things and certainly wasn't trying to disseminate its experiences based upon information which has been gleaned or experiences which have been recorded, or sort of sensed out of the practice, so hence we started talking about research. But one of the problems that I sensed when we started this was also there was not unanimity about the way forward. Um, you were very much action-orientated, looking to make sure that research wasn't for the sake of research, it had to have an impact out in the community or feedback to the community - giving some response - you had a sense that [names a Board member] /academia had a different perspective, um, tending to be more from the academic objectives rather than the improvement of the life of the people in the community. So that was one of the things that I remember quite clearly about the actual... the research unit. The second one I think was...it was a fairly limited unit in terms of number of people, so the result of which...the coverage of the work was fairly limited and in many respects I think the people who were departmentally orientated actually saw it as a burdensome thing, demanding of them recording, and demanding of them making reports and demanding of them...The more your unit was driving the need to report in a particular format to record the issues involved and to manage the whole process in terms of recording looking for improvement, looking for impact, the more people were saying 'Hey, this is getting more complex...'. So I think one has to say, why is that? I think...my observation, Clive, is that, at Valley Trust there's a number of layers...I think on occasions I mentioned to you, you had a high intellect, you liked to see things intellectually, to question them, try to look for outputs, outcomes, impact. To many others, they, they may have had a reasonable level of intellect, but they didn't really see the need to apply it further than doing a day's work. That I think was one of the frustrations that I had at Valley Trust, because I wanted to see an organization that was constantly improving, constantly being out in the front, being able to present results, not just saying like Little Jack Horner, putting his thumb in the pie and

saying 'What a good boy am I - here we are guys, doing this wonderful Primary Health Care project down in the Valley of a Thousand Hills, thank you', and nothing substantial to support what you're doing in terms of...And I tried to understand why there was that gap, and I don't really - other than what I've just told you about...that their attitude - and looking back at the Annual Reports from Halley Stott's days, we certainly lost the inquiring aspect of the work that Halley Stott...and even in the days of Chris Mann and Irwin Friedman the inquiring context of Halley Stott was missing. Theirs was functional stuff: build the roads, build the pipeline, and that was great stuff. I think...and that's something else about my reflection on my years of Valley Trust, and the history of Valley Trust, is that the organization had to move and address issues of the time, um, by the time I came to Valley Trust we were confronted with 1994, the new democracy, the need to get community participation and the need to distribute wealth, distribute organizational assets in terms of projects...And maybe in that, those different transformations, we lost the focus on the importance of that knowledge and research component. But nevertheless I think, looking beyond the sort of problematical issues, there were good outputs. I think people did produce some valuable information...I think that some of the stuff that was very good was starting to, um, record better, but whether we used that...that's my concern...People were uncertain or unsure of moving into the area of advocacy, confrontation to a certain extent, um, so again, for many reasons - the same happens in academia - they produce very good research projects, reports, and they lie on the table, there's nobody willing to pick (them) up...

(Interview with Keith Wimble, 30th December 2009.)

Let me now touch on the second issue I want to mention before bringing this chapter to a close...

It is not easy to put into words, but I want to say how difficult I have found it to describe the changes which I have experienced at The Valley Trust since I joined in 1984. At one level it has been difficult to condense 26 years of experience into a few pages, and I have necessarily had to leave much out and simplify events and processes which have been extraordinarily complex. At another level I have experienced a sense of deep satisfaction about the extent to which the organization has adapted and developed, and a sense of

pride in my own role in helping to bring about that development. But I have also been aware of another emotional difficulty. In writing this chapter I have experienced a sense of loss, a perhaps overly nostalgic sense that when I joined the organization I was joining a family rather than an organization. Perhaps this had something to do with the relatively small size of the organization back then; definitely it had to do with the individuals who had been drawn to work in the organization. Perhaps it also had something to do with my age and where I was on my own path at the time. Nevertheless, the organization is a very different one now, a much larger one in which the pressures of work leave little time for frequent connection between staff members at a deeper level. Not that this is necessarily a bad thing. Organizations, like individuals, change, and only time will reveal the meaning of the changes. No doubt the external environment within which The Valley Trust has operated also played its part in shaping the destiny of the organization - the period since 1990 has, after all, seen momentous changes and challenges which were bound to influence any organization working in the spheres of health and development. And our vision and approach are, to my mind, exactly right for our time and for what the future is asking of us, but I still miss the leisurely chats about the work, the tea on the veranda, the old NGO atmosphere...

And so here again I find myself slowly learning what I already know: that change is inevitable and usually painful or, at best, challenging. The Valley Trust is not the organization it was 26 years ago when I joined, but why should I expect it to be? I am not the person I was 26 years ago, but the desire for the known, the comfortable, the unchanging is strong. So I try to recognize this in myself and accept that, as Machado says, "*...by glancing behind one sees the path that never will be trod again,*" and I walk on...

Chapter 3: The Dance²⁵

Only in a hegemonic sense is there ever just one story to be told... (2002).

'Truths' become products of a process in which people come together to share experiences through a dynamic process of action, reflection and collective investigation. At the same time, they remain firmly rooted in participants' own conceptual worlds and in the interactions between them (Gaventa & Cornwall, 2006:124).

Storytellers and their temporal understandings are thus key elements in understanding organizational change (Pedersen, 2009:403).



Part 1

In Chapter 2, I portrayed something of the history of The Valley Trust and attempted to present some of the important processes which have contributed to the formation of the organization as it exists today. Inevitably, for reasons of space and to maintain the flow of the story, there is much that I have omitted. And in writing this, I know that I have glossed over or omitted some events for other reasons, including the fear of offending colleagues both past and present; Vickers (2002:614) points out that, "...it can be dangerous to write about what goes on in organizations," and Hoskins and Stoltz (2005:95) note that

²⁵ Chapter 3 is a long chapter, and I considered breaking it into several shorter chapters. However, in the end I thought it better to leave it intact, so as to maintain its integrity and a sense of the way in which conversations and ideas flowed from one meeting and event into another. In doing so, I am aware that there is a risk of the reader losing the thread of the narrative, and so it might be helpful to read the chapter in four parts, based on the ten meetings of the Cooperative Inquiry Group - Part 1: the introduction and meetings 1 - 3; Part 2: meetings 4 - 5; Part 3: meetings 6 - 7; and Part 4: meetings 8 - 10.

Too often, and long after becoming deeply involved in a project, researchers find themselves in a bind about how to avoid offending participants with the results of their analysis. This is particularly problematic when dealing with small sample sizes in narrative research.

From this third chapter onwards, my thesis will unfold in largely chronological time, which will allow me to relate processes and events in the order in which they occurred. This will hopefully allow the reader to experience something of the journey of discovery as it happened. However, I will also make use of *narrative time* in order to make sense of what occurred. The concept of narrative time is defined by Pedersen (2009:390) as "*...open time, that is, time can be defined in many different ways: as historical time, as living time, as foreshadows of time or as time bound to space.*" Pederson goes on to explain (p. 393) that

Foreshadowing and sideshadowing are narrative time concepts that define time as asymmetric. While the past is given, the future is open, and the present represents the possibilities of the moment. The past, the present and the future are different times that have different degrees of openness. Past and present are the most asymmetric, because we can shadow ourselves in a potential future while we are manoeuvring around in present time. The shadows of time reflect the relations of past, present and future.

At first I struggled with these ideas of different understandings of time, but have come to find them very helpful in making sense of what did, and didn't, happen during the course of my research, and my use of narrative time will become clearer as I portray my attempts to institutionalize knowledge work at The Valley Trust.

I will also use a largely chronological form to describe the literature which has been significant on this journey, rather than make any attempt at a conventional literature review. My experience of reading the literature pertaining to my research has been an interesting one in itself, with relevant readings appearing with remarkable synchronicity. In opting not to include a formal literature review, I should add that in this I have been influenced by Reason (2008:1373), who suggests that

...a piece of doctoral research is often expected to include something called a literature review. Classically, in a positivist paradigm, a literature review would explore the existing field of knowledge in the field, identify where there were gaps in the field, so that a hypothesis could be developed and tested in an experimental design. Very often, without thinking, PhD students (and their advisors) fail to see that this form of literature review is appropriate, and only fully appropriate, within a positivist paradigm.

I have also been impressed by Bochner's (2001:132) caution that

We can call on stories to make theoretical abstractions, or we can hear stories as a call to be vigilant to the cross-currents of life's contingencies. When we stay with a story, refusing the impulse to abstract, reacting from the source of our own experience and feelings, we respect the story and the human life it represents, and we enter into personal contact with questions of virtue, of what it means to live well and to do the right thing.

Therefore, while recognizing the importance of demonstrating an appropriate grasp of the literature in my thesis, I am trying to do so while at the same time honouring the integrity and continuity of the story; I find that this balance is sometimes a difficult one to achieve, and one which can result in a certain clumsiness in the narrative flow. I therefore take heart from Richardson's observation that "*There is no such thing as 'getting it right' - only 'getting it' differently countoured and nuanced*" (2000:930-931).



Thus, through my experience of the various organizational initiatives, as well as the partnerships which I described in Chapter 2, my interest in organizational knowledge work had grown to the extent that by 2006 I knew that I wanted it to be the subject of my PhD research. At this point, I must also describe the influence which two readings had on nurturing my fascination with knowledge work. The first was an article by Peter Reason (1998a), "*A participatory world*," in which he also referred to four ways of knowing; three of these (experiential, propositional, and practical, were the same as those which I was to hear about from Richard Bawden, but the fourth was different: presentational knowing.)

These resonated with my rapidly expanding ideas about health and development, and the "knowing in partnership" which I was experiencing through NICHE. I encountered Reason's article just before my exposure to Richard Bawden's four ways of knowing during one of the CHESP modules, and the two complemented each other in a highly stimulating way. I was especially taken with Reason's (1998a:44) suggestion that,

While within a traditional scientific view of the world, the creation of knowledge belongs to specialist researchers, within a participative worldview research is something people do together to solve problems of concern to them. Hence a collaborative form of inquiry, in which all involved engage together in democratic dialogue as co-researchers and as co-subjects.

The second article was one which I found through an internet search: "*The duality of knowledge*" by Hildreth and Kimble (2002). This article introduced me to the idea that knowledge is both hard *and* soft, and helped me to understand my frustration with the focus on databases and statistics at The Valley Trust at that time: it wasn't that the hard knowledge that the organization prized so highly was irrelevant; it was just that it was only part of the whole, and although I realized that The Valley Trust was emphasizing hard knowledge at the expense of soft knowledge, I also felt powerless to do much about it. The article was significant in another way: it became a portal to the writings of other authors whose work I had not encountered until then. In particular I was led to the writings of Nonaka and his colleagues (Nonaka & Konno, 1998; Nonaka, Toyama, & Konno, 2000) and I was struck by the idea of *ba*²⁶ and its links to participatory knowledge creation. I was also, for a while, intrigued by the SECI²⁷ process described by Nonaka *et al* (2000), although I soon came to reject it in the context of the type of knowledge work which I understand

²⁶ I will write more about *ba* later in the chapter, but here let me include a definition from Nonaka *et al* (2000:14): *ba* is "...a shared context in which knowledge is shared, created and utilized."

²⁷ Nonaka *et al* (2000) claim that knowledge can be converted from the tacit to the explicit and from the explicit to the tacit through the SECI process: socialization, externalization, combination, and internalization. However, as Hildreth and Kimble point out, tacit knowledge is inexpressible and by its very nature cannot be "converted" through any formal, structured process (although that does not mean that tacit knowledge cannot be shared in other ways). Again, I will elaborate on these ideas later in my thesis.

The Valley Trust to be engaged with. My intuitive sense that the SECI process is unsuitable for The Valley Trust's context was strengthened when I read an article by Cook and Brown (1999), in which they point out that tacit and explicit knowledge are in fact different *forms* of knowledge, and (p. 384) that "...the distinction needs to be conceptually clear because, in practice, each form of knowledge does work the other cannot." The article by Hildreth and Kimble also introduced me to the writings of von Krogh, in particular his article "*Care in knowledge creation*" (Von Krogh, 1998). This was a particularly important reading, as I think that it was through this reading that I started to realize that *knowledge lives in relationships*.²⁸ Von Krogh observes (p. 136) that

Effective knowledge creation puts particular demands on the way people relate to each other in a company. Untrustworthy behaviour, constant competition, imbalances in giving and receiving information, and a "that's not my job" attitude endanger effective sharing of tacit knowledge... Overall, good relations purge a knowledge-creation process of distrust, fear, and dissatisfaction.

By this time my interest in knowledge work had been stimulated to a remarkable degree, and following some exploratory meetings with faculty on the Pietermaritzburg campus of the University of KwaZulu-Natal, I was working on my PhD proposal. One of the things that troubled me was that so much of the literature on knowledge work had its origins in the corporate sector, and I was struggling to find references to the NGO sector. However, as was so often to happen later, a crucial reference appeared at just the right time: Ben Ramalingam's excellent "*Implementing knowledge strategies: lessons from international development agencies*" (Ramalingam, 2005a). This reading provided me with eight questions (p. iii) which were to become one of the organizing frameworks for my research:

1. How is knowledge and learning understood and applied?
2. How does knowledge interface with the existing structure of the organization?
3. How do knowledge activities link to existing core functions of the organization?

²⁸ I am grateful to Craig Morris for the insight that, based on some of the difficulties which I experienced during the later stages of my research, knowledge also has the potential to *die* in relationships.

4. How do knowledge and learning link with the existing support functions of the organization?
5. How do connective physical and electronic infrastructures support knowledge and learning strategies?
6. How does knowledge and learning link to vision, leadership and management?
7. How does an organization measure the costs and benefits of learning and not learning?
8. How does the knowledge programme address the external aspects of knowledge and learning work?

In addition to my readings around knowledge work, I was also delving into the literature on arts-based inquiry. Given my long-standing interest in the arts, especially the graphic arts, for my Master of Commerce research I had created a palimpsest both as a way of coming to understand my findings and as a way of representing my findings. During my reading of the literature for my Master of Commerce research, I had encountered the writings of Eliot Eisner, in particular "*The promise and perils of alternative forms of data representation*" (Eisner, 1997), from which I have already quoted in this thesis. As I extended my readings on arts-based research, I discovered that some journals are actively encouraging alternative representations of research, and I have become an avid reader of *Qualitative Inquiry*, *Qualitative Research*, and *Educational Insights*.



Given the influences which I have described so far in this thesis, I was keen to adopt a methodology for my doctoral research that would be action orientated so as to contribute to "*human flourishing*" (Reason, 1998a); that would be participatory; and that would lend itself to creative forms of representation through multiple voices. (And here I am using the term "voice" to encompass not only the written or spoken word, but also other forms of representation such as photographs, drawings, song, and dance.) I had been impressed by the integrity inherent in the work of a co-operative inquiry approach as described by

Reason (1988b), and decided that this should be the starting point for my research. I raised the possibility of starting such a group at one of our monthly Managers' OD meetings²⁹ on 22nd February 2007, and received a positive response. I therefore sent out the following e-mail on 1st March 2007, inviting my colleagues at managerial level, plus any interested staff members in their departments, to a meeting at which the co-operative inquiry group would be initiated:

----- Original Message -----

From: [Clive Bruzas](#)

To: ['Richard Haigh'](#) ; ['Tuki Maseatile'](#) ; ['Clive Bruzas'](#) ; ['Gloria Mthethwa'](#) ; ['Jabu Mngadi'](#) ; ['Keith Wimble'](#) ; ['Khantsho Kolisang'](#) ; ['Liz Green'](#) ; ['Sam Buckas'](#) ; ['Sthembiso Mndebele'](#)

Cc: ['Glen Jager'](#) ; ['Lungile Mchunu'](#)

Sent: Thursday, March 01, 2007 11:26 AM

Subject: Knowledge management at TVT

Dear Colleagues,

Further to our discussion at the Managers' OD meeting held on 22nd February, I would like to invite yourselves and any interested member of your department, to a short meeting to discuss an action research programme around knowledge work at The Valley Trust. The first step in the process would be to establish a cooperative inquiry group, and I hope that this will be possible at the meeting.

I would like to meet on Friday 9th March at 14h00 in Seminar C. This will be an initial meeting, so please don't feel excluded if you can't make it – there will be opportunities to catch up later. However, I would like to have an indication of who will be coming, so please can you let me know by Wednesday 7th March.

Many thanks,

Clive

Although the e-mail extended the invitation to "any interested member of your department", I addressed it specifically to the director and my fellow managers, and copied it to two colleagues in the OD Department. Why did I address the e-mail to this specific group?

²⁹ I had initiated the monthly Managers' OD meetings when I was manager of the OD Department. These meetings were intended to provide an opportunity for managers to meet regularly to reflect jointly on the work of the organization in more depth than might otherwise have been possible. The meetings were held in addition to regular All Staff meetings, which encouraged all members of staff to reflect together but which, because of the relatively large number of staff members involved, could not always provide for the depth of reflection which the Manager's OD meetings did. While I think that the Managers' OD meetings were largely respected and found to be valuable, there was a tendency on the part of the Director at that time to refer to them as "Clive's meetings", which always made me feel uncomfortable and, in my view, somewhat diminished the level of ownership of the meeting for which I was striving.

As I described above, I had been strongly influenced in my thinking about my research methodology by the writings of Peter Reason. With John Heron, he describes the start of a co-operative inquiry group as follows (Reason & Heron, 1999:3) :

The first thing is to bring a group of people together who have a common interest. In Phase One a group of co-researchers come together to explore an agreed area of human activity. In this first phase they talk about their interests and concerns, agree on the focus of their inquiry, and develop together a set of questions or propositions they wish to explore.

They also point out (pp. 8-9) that

Most inquiry groups are initiated by one or two people who have enthusiasm for an idea they wish to explore. They are quite often engaged on a research degree and are attracted to co-operative inquiry as a means of doing research.... The initiators first task is to gather together a group of people who will be interested in joining the project. Sometimes the group is self-evidently formed, but more often it is recruited by some form of circular letter...

In initiating the knowledge work co-operative inquiry group (CIG), I sent an e-mail to a group which I thought would be "self-evidently" the "right" group. Why did I think that this particular group would be the "right" group? When I submitted my research proposal, I was asked to elaborate on the intended membership of the CIG, and I felt that I had to present something more concrete than I had up to that point. I therefore gave some thought to the question of who might "drive" knowledge work within an organization. For some time I had been grappling with the question of "institutionalizing" change. This question arose strongly during the CHESP programme, when it was emphasized that in order for significant change to be maintained within an institution of higher learning, the change needed to be institutionalized at different levels through the formulation of policy and the introduction of strategies and action plans which would help to operationalize the change. It was also assumed that change needed to be managed and held by senior staff within the institutions, although it would be implemented at many levels. So, in selecting a "self-evident" group for the CIG at The Valley Trust, I decided to target the management team on the assumption that this group would have the positional authority to drive the

knowledge work process. With hindsight, I would have initiated the CIG differently, as I now believe that knowledge work needs to be held at many different levels and is not necessarily driven by management; indeed, management can become a block to the implementation of knowledge work. But this insight only came to me much later in my research, and I'm getting ahead of myself.

Fortunately, an interesting mix of colleagues responded to my invitation, and the following colleagues became members of the CIG:

- Tuki Maseatile, our Executive Director, attended a few meetings.
- Elizabeth (Liz) Green has been an enthusiastic and regular member, and has responded to several of my writings. When the CIG first met Liz was The Valley Trust's Finance and Administration Manager, and is now Senior Manager: Organizational Support.
- Khantsho Kolisang was, at the start of the CIG, the Conference and Leadership Centre manager, and is now Senior Manager: Programmes.
- Jabu Mngadi has been another regular participant in the CIG; she is The Valley Trust's Human Resource Manager.
- Claudia Ringewaldt was another enthusiastic participant who always responded to my writings. She was Geographic Information System Specialist in the Information Management Department, and then in the Monitoring, Evaluation and Research (M, E & R) Division. She resigned from The Valley Trust in February 2009.
- Glen Jager. I met Glen through the NICHE programme, and started working closely with her when she joined The Valley Trust in 2002 as a member of the OD Department. I am indebted to her for many fascinating conversations and shared experiences. Glen is now a member of the Programmes Division.
- Lungile Mchunu was a researcher in the OD Department and was a committed member of the CIG. She resigned from the organization in 2008.
- Gugu Shezi is now a manager in the Programmes Division, although when she joined the CIG she was a member of the Whole School Development Department.

- Thami Kheswa and Phindiwe Mashiloane are both members of the Social Plant Use team within the Programmes Division. When they joined the CIG the Social Plant Use team was part of the Integrated Technology Department. I specifically asked them to join the CIG because, in my view, the Social Plant Use team was one of the few teams in the organization which was actively reflecting on and documenting their work; they were also consciously working to incorporate indigenous knowledge into their practice.
- There was one other member who attended on occasions, but requested in an e-mail³⁰ that I refrained from using her name in my writings, so I will refer to her in my thesis as "a colleague."

Twelve members seemed a good number. Reason and Heron suggest (p. 9) that *"Groups of up to twelve persons can work well. Below six is a little too small, cutting down in variety of experience; above twelve needs time and maybe professional facilitation to manage."*

And what was my position in the CIG? I have found my role to be a difficult one to balance. As the one with the initial enthusiasm for the idea, I initiated the group, and in many ways held the group and its processes. To be honest, I don't think that the group ever took on a life of its own, and would probably have disintegrated if I had not called the meetings, facilitated discussions, circulated readings, and reflected on the progress of my research in a series of writings. I say "my" research, and perhaps that is the key: did research into knowledge work ever become "owned" by the CIG? It's hard to say, because there was certainly enthusiastic participation by some of the members. But I don't think that research into the organization itself and its knowledge processes came to be shared by the group as a whole. Holian (1999:3) reflects on her experience of this tension between organizational interest and her own research focus:

On reflection we still believe that forming an action research team in order to address a problem of central importance to the organization was a useful choice. Choosing the same

³⁰ "Hi Clive, I would like to continue to contribute to the 'group', however I would prefer if you don't use my name to describe my activities or ideas and thoughts. Please rather describe me as a colleague."

project as the focus of my academic research proved to be an enormous challenge, however a 'tame' topic would not have grabbed and held my attention so well, nor given me the answer to the question 'who cares' when the going got tough.

There was also the question of power. When I initiated the group I was OD Department Manager, and then from 1st April 2008 became Senior Manager: M, E & R Division. Although I have always attempted to minimize my positional authority unless circumstances require it, there was and is an indisputable organizational hierarchy which has to be recognized, and I will take up this issue of power in much more detail in chapter five.

Let me now describe, meeting by meeting, the work of the CIG. I believe this to be necessary because of the way in which the work of the group informed the development of a knowledge work strategy for the organization, and for the insights which I gained through participating in the group both as a member and as a researcher.

The first CIG meeting, 9th March 2007.



Five of us met for the inaugural meeting of the knowledge work CIG: Glen, Gugu, Lungile, Khantsho, and me. I gave a brief explanation of the co-operative approach to inquiry, and presented my thinking about knowledge work within The Valley Trust based on the figure of eight diagram, the history of which I have described earlier in this thesis. (The version on the left was drawn during The Valley Trust's 2006 strategic planning, when knowledge work - or, as it was termed at the time, *knowledge management* - was discussed in some detail. The following description of the figure of eight - or lemniscate - is adapted from the 2009

The "figure of eight" diagram in current use at The Valley Trust.

knowledge work strategy, which is included in my thesis as Appendix 4):

The lower loop represents our "learning in and from action" - that learning which emerges from the interweaving of action and reflection. For example, some of the recent planning sessions in the Programmes Division have demonstrated a definite willingness amongst staff to engage at a much deeper level with questions about our work: What are we really trying to change? (as opposed to a previous focus on what are we setting out to do?); What strategies will we employ to bring about these changes? What evidence will we look for to indicate that the desired changes are indeed happening? This indicates a shift in the thinking of many colleagues, from an activity focus to a results focus.

Moving to the centre of the lemniscate, we come to the "cross over point,"³¹ that point which we see as the "organizational level" of the flow of learning and knowledge creation. It is out of this organizational level that we might be able to say that "In the experience of The Valley Trust..." and know that that experience has been discussed, shared, argued, agreed, and perhaps documented, by a majority of staff members.

The upper loop is perhaps the least understood at this time, possibly due to the fact that the activities and processes associated with this level have historically been the preserve of very few staff members: writing for publication; presenting at conferences; reporting to donors; advocating; engaging with students and faculty. This is the level that will require us to ask ourselves: how can we best represent our work, and the results of our work, to others? How creative can we be? Here it must be emphasized that it is not a case of being creative for the sake of being creative! Participation in, for example, a government-convened committee may present an excellent opportunity for sharing our learnings, but may require very conventional representations of what we do and how we do it.

³¹ The term "point" is used loosely here. It is not viewed as a fixed point, but rather as an opportunity in space and time for breathing, making connections, and coordinating. Something more like T S Eliot's "...still point of the turning world. Neither flesh nor fleshless/Neither from nor towards; at the still point, there the dance is..." (T S Eliot, 1963:191).

In the discussion³² which followed my presentation, Glen pointed out that perhaps it's not that we don't learn, but rather that we struggle to *articulate* our learnings. "Our learnings do get expressed in action. And are there realistic alternatives to reports? I think that the focus on 'capturing' our learnings in reports can trivialize our learnings!" I suggested that the question which Glen had raised was part of the "crisis in representation" referred to by Denzin and Lincoln (2000:16) and Lincoln and Denzin (2000:1050-1051). In the first reference, Denzin and Lincoln (p. 16) note that "*[The representational crisis] confronts the inescapable problem of representation, but does so within a framework that makes the direct link between experience and text problematic.*"

"I once attended a Master's presentation which used art," said Glen, "but I couldn't grasp the *learnings* of the student. Can we create a learning situation that allows people to experience your learnings for themselves?" This sounded to me like the challenge expressed by Eisner (1997:7), when he cautioned that, with some forms of alternative representation of data, "*Everyone confers his or her own idiosyncratic meaning to the data. No consensus is possible. The data mean whatever anyone wants them to mean; or worse, no one knows what they mean.*"

"I've had the experience of colleagues not recognizing the value of what they know," said Khantsho. "I was talking to a colleague the other day about her work, and realized that what I was hearing hadn't been mentioned in her report. I asked her about this and she said 'But we were just talking!' Even reflection can put one off! Language inhibits us - giving

³² I deliberately decided not to record this first meeting out of a concern that, given the newness of the process, participants might find the presence of even the small digital recorder intimidating. I have therefore reconstructed the conversation which I present for the first and second meetings from the notes which I made during the meetings. All the subsequent meetings were, however, recorded. In reconstructing these first two conversations, I think that I have represented the content of what was said as accurately as I can, given the limitations of my ability to record the words of participants as they were speaking, and the inevitable filtering (through what I heard or interpreted) of what they said. However, I acknowledge that the true voice of the participants is not represented as well as it could be: I have omitted the pauses, the repetitions, the hesitations, the emphases, all of which lend authenticity to the record of a conversation.

something a name can inhibit us. We come from a story-telling culture, but Glen writes down my stories!"

"But then we can reflect on those stories to see what they mean," responded Glen, "and that takes them to a different level. We need to look at the real world first, then it's easy to bring in the theory."

"We need an inquiring mind to learn from a conversation or story," said Gugu, "otherwise it stops there. Another problem is that we compartmentalize things, but knowledge is connected. We also need to listen to what is *not* said."

"That's evaluative thinking in practice!" Glen exclaimed. "The inquiring mind! But people understand things differently - we need to explore ways of data gathering and how we make meaning."

"Even if we write reports," I asked, "how do we access the information months later if we need it?"

"It's about creating an environment that allows the flow," suggested Khantsho, perhaps unknowingly echoing the assertion of Al-Jayyousi (2004:171) that "*It is the flux that creates knowledge...*"

"I had a shocking experience relating to one learner's story when I visited a school recently," said Lungile, "but can I generalize from that? How representative was that experience of learners' situations in general? Also, one can 'know' things, but it needs the right time to 'learn' them. Even passion can be difficult to express, to verbalize."

"Meaning," said Glen, "sometimes emerges out of 'where one is at' at any given moment. Things sometimes need to incubate before the time and place for the Aha! is right."

As the meeting drew to a close, I asked where participants would like to take the process. Because so much of what had been raised resonated with what I'd been reading, I tentatively suggested that I could share some of the articles, noting, however, that I didn't want to take us away from practice. But Khantsho said that the readings could also stimulate us, so I undertook to let everyone have copies of a few selected articles. I also thought that it would be interesting to have a member of the group share something about their work in detail for us to look at from a "knowledge perspective", and Lungile offered to prepare a document for a future meeting. There was a brief discussion about the size and continuity of the group, and then we closed, agreeing to meet again on 5th April 2007.

I felt happy with the meeting. Although the group had been quite small, I felt that the conversation had flowed freely, and that several interesting issues had been raised. And without intending to do so, and without making the issue explicit, we had started to converse about Ramalingam's first question: *How is knowledge and learning understood and applied?*

I looked forward to the next meeting.

The second CIG meeting, 13th April 2007.

The second meeting of the CIG raised an important question for me, because the group that gathered was a different constellation of participants: Glen, Jabu, Liz, Khantsho, and me. Because Jabu and Liz were new to the group, we went over much of the ground we had covered in the first meeting: the role of the group, how often we should meet, and the most convenient time for meetings. While I had indicated in my e-mail that "*there would be opportunities to catch up later*" for those who couldn't make the first meeting, I started to wonder how often the group could accommodate newcomers and still move forward. As a result of engaging with the writings of Nonaka *et al*, I was starting to think of the CIG as a *ba*. Although Nonaka *et al* (2000:15) point out that "*The concept of ba seemingly has similarities to the concept of communities of practice,*" they go on to state (p. 16) that

While the membership of a community of practice is fairly stable, and it takes time for a new participant to learn about the community to become a full participant, the membership of ba is not fixed: participants come and go.

However, they also state (pp. 13-14) that

Knowledge needs a context to be created...the knowledge-creating process is necessarily context-specific in terms of who participates and how they participate. Knowledge needs a physical context to be created: "there is no creation without place". 'Ba' (which roughly means 'place') offers such a context.

The above two quotes seem to me contradictory; if, as was becoming increasingly obvious to me, knowledge lives in relationship, then it seemed to me that continuity of attendance in a *ba* is crucial to relationship building and maintaining a necessary "thread" of learning and knowledge creation. Of course, related questions then arise: what is the relationship of one *ba* to another? How is the knowledge created within a *ba* (by the regular participants of that *ba*), shared with colleagues who are not part of the *ba* but might well be part of one or more other *ba*? How can the participants of a *ba* avoid becoming an organizational subculture which has difficulty communicating with others in the organization, as described by Schein (undated).

With these thoughts in mind, I facilitated a CIG meeting which started to ask about some of the terminology of knowledge work. Khantsho asked about the apparent "hi-tech" nature of knowledge management, and the associated "computer stuff." Glen pointed out that there is a tendency for "bandwagon" use of knowledge management terms, and Liz drew attention to Hildreth and Kimble's article (2002), which she had found helpful in getting to grips with some of the terminology. Somehow the topic of indigenous knowledge was raised.

"Where does indigenous knowledge live?" asked Khantsho. "Where do you go to find it?"

Glen described some of her experiences with the Integrated School Community Development Programme in Pholela, and commented on the seasonal aspects of the

programme, the difficulties of working in the rain and mud of summer, and the cold and snow of winter. This prompted a discussion of "seasonal bias" in our work, and how Chambers (1993) has emphasized the importance of this in development work.

Just before we closed, Glen gave voice to the question which had been troubling me: "When does this group meet as opposed to all the other meetings going on in the organization? How does the conversation we are having in the CIG relate to the other organizational conversations?" We decided that we would need to give this some thought, but didn't pursue it then as we had run out of time.

The third CIG meeting, 26th April 2007.

The third meeting revealed a more stable participation, with no "new" members attending; present were Glen, Lungile, Jabu, Liz, Gugu, Khantsho, and me. As promised, Lungile had written a reflection on her work - with a peer education programme baseline survey - for discussion at this meeting, and had circulated it to members beforehand. How did the meeting progress?

We started by "checking in" on the readings which I had circulated, the one by Hildreth and Kimble (2002) which had been so important for me, Snowden's (2002) article, and a short article by Zeleny (1996), in which he states (p. 2) that "*Knowledge is purposeful coordination of action.*"

"I've only managed to scan," said Jabu, "but I, I've found the articles very interesting in terms of what they say about knowledge and knowledge management."

"I must say I've also scanned right through," added Lungile, "I haven't given much attention, but...uh...on what I've read I've found very interesting and quite revealing because some of the things I wasn't aware of..."

"Anything in particular?" I prompted.

"I mean like, how knowledge is divided," she responded, "because like, for me, the assumption is if you know something you know it. But this kind of differentiating knowledge in terms of it's fluid, it's solid, which, when you get to thinking really hard about it, it makes sense, but it's something that you do not regularly think of, much. As I was reading through the articles, it kind of made sense for me."

"I went through quite quickly," said Liz. "I particularly liked the Zeleny article, I found it very interesting and I homed in on '*Although information is an enhanced form of data, knowledge is not an enhanced form of information.*' I find that quite helpful."

"Yeah," added Lungile, "and the issue of information and knowledge, I mean maybe, um, because I'm a second, er, English is my second language, I've never really thought of it that much, the difference between the two, that knowledge and information and *data* are quite vast, but in a way similar."

"But I just think, I mean I think it's not only language, Lungile," observed Glen. "I think it's a...I think it's a current, it's a current sort of *bandwagon* term. Right now people talk about knowledge management and they will mean a database. 'Cos I think, you know, I think, that this to me, it was such a relief...it's always to me such a relief to see people writing and saying *databases* are not *knowledge*. It's, it's just like a box of paper that's got things written on it. It's just the *tool* on which something is, inside which something is collected."

"Could we try and sort of make this concrete by starting to look at what Lungile wrote?" I asked. "I was hoping we could use her reflection to look at some of the differences..."

So we moved on to discuss the reflective writing that Lungile had prepared and circulated: in her paper, she focused on her personal responses to what she had been hearing from

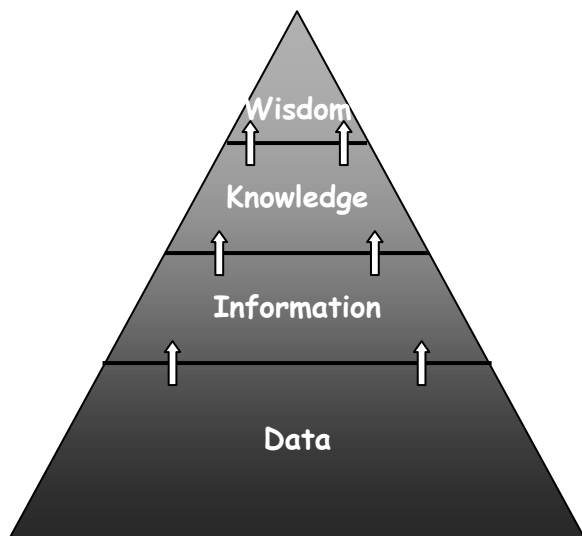
learners in the schools in which she had been conducting the focus group interviews, for example:

My first reaction to what is happening in schools was that of horrific shock. I felt like screaming and saying "This shouldn't be happening, not at this early age and not in this day and age". The truth is it is happening. I felt like the girls and boys as well in schools are in this fast moving train that is heading straight for the wall. I remember coming back from the schools feeling absolutely tired and sometimes ashamed that I cannot do anything to stop or change the situation. I felt like my work was unearthing horrible realities and doing nothing to change or to assist in the process of changing what I have discovered. This is not a good feeling to have hanging over you.

"So you do these focus group interviews," I said, to clarify the data gathering process, "and you tape those, and you bring back the tapes - in this case it's digital, isn't it? Then you download it onto your computer, and then what?"

"And then after that, well, I just listen through it now, go over it again," answered Lungile. "Then I start typing up a transcript which, on its own, is quite tricky 'cause they are conducted in isiZulu, so then when I produce a transcript it has to be English because Valley Trust works in English, so I might not, I might not be interpreting the experience or the thoughts of the learners, or the stakeholders, correctly, that's one thing I might not be doing...'cause they might mean one thing and I might be saying the other."

So already, at this point in the process, it seemed that something, some essential aspects of the data may well have been "lost in translation." Lungile added that after translation and transcription, the transcripts were given to colleagues in The Valley Trust's Information Management Department to analyze, and the results and recommendations were sent to the organization which will be planning and implementing the Peer Education programme in participating schools. To better understand this process, we used the knowledge management pyramid (on page 57) to try to understand the knowledge "flow" in this programme, from qualitative data to information to "knowledge" and who was involved,



The knowledge management pyramid, adapted by Clive Bruzas from Rowley (2007:164)

and as we looked at it, the process, the "whole", appeared increasingly disjointed - the flow broken.³³

I attempted to summarize the conversation: "OK. So somewhere here there's something lost in translation. Then it's analyzed, and..." - I found myself grasping for words - "do we think that that process of analysis is going to produce some sort of information? If we, if we think that according to that pyramid, data

becomes information through some sort of contextualizing...is that what it says?"

"But I also, I have a problem with that," said Lungile. "I'm understanding what you're saying about our colleagues being the ones to analyze the data while they were not there. But also myself, as the person who...the researcher, I'm not sure if...I don't know...again, going back to the paper I've written, I'm not sure I would project, if I were to analyze the data, would I be projecting my own thoughts and feelings about what was said as well? So I might not be presenting exactly what the group was saying..."

"But, sorry," said Glen, "a trained researcher won't do that. A trained researcher will, will develop *skills* for keeping the *voice* as much as possible, and *knowing* when there's a, a subjective interpretation though, I think, I mean I'm not just saying *you*, I'm just saying

³³ I now feel far less enthusiastic about the knowledge pyramid than I did at the time of this meeting. Although it is often regarded as a useful way of thinking about the relationships between data, information, and knowledge, it has become - as noted by Patrick Lambe (2010) - something of a sacred cow, indeed "*It's about as sacred as a sacred cow can get.*" The weaknesses of the model are also the subject of an interesting entry on Ewen Le Borgne's blog "KM for me...and you?" in which he states (6th February 2010) that he finds the "...*DIKW [data, information, knowledge, wisdom] quite limited and rather dangerous*" because it poses "...*a linear representation of data all the way up to wisdom...*" which "...*assumes a natural hierarchy among these four variables. And it seems to suggest that one is better than the other when we are talking about different things.*"

generally. I mean I'm saying that it's possible. And then always, I mean our colleagues doing the analysis have got a possibility of being subjective too, even if they weren't there. Can you hear what I'm saying? So that it's, there's *always* a subjective voice."

"So," asked Khantsho, "whose responsibility it is to make meaning?"

"It's everybody's, isn't it?" asked Glen.

"For me, it's not whose responsibility is it for making it, but whose knowledge is it?" asked Jabu.

"And who *owns* the research?" asked Glen.

I found this KM group discussion very helpful from a number of perspectives: the CIG was starting to explore the way in which The Valley Trust worked with knowledge, and also how we understood data, information, and knowledge in the context of a concrete example from our work (including our own subjective relationship to the data and the ways in which we make meaning.) We had also raised the critical question about the making of meaning, and recognized the participatory dimension to this. And then we had touched on the issue of power: *who* owns the research, and *whose* meaning is it when meaning is made? I was especially pleased that these topics had arisen *out of the process itself*, as I had been reading McFarlane's (2006) article and on page 288 he notes that

...there is a pervasive rationalist conception of knowledge as objective universal and instrumental. Any discussion of knowledge and learning in development cannot ignore the ways in which the movement of knowledge is conceived, and I will argue that knowledge transfer is often conceived as a linear process whereby untransformed knowledge acts as a technical solution to a given development 'problem'.

McFarlane goes on to point out (p. 288) that there is an alternative post-rational perspective,

...an approach that conceives knowledge and learning as partial, social, produced through practices, and both spatially and materially relational. In this reading, knowledge-in-travel is

conceived as caught in translation, as always open to invention and change, and as multiple in form and effect.

I think that Lungile also found the conversation helpful; in her monthly report for April 2007, she noted that

In a way, this group has critiqued one of the programmes that I am involved in and in turn I am critiquing the programme. This has raised a lot of questions in my mind about the intention and the way that this programme has been carried out. Most importantly for me is the issue of knowledge; from what I know, encounter everyday, unearth from time to time; what qualifies as knowledge? Who's to say what knowledge is or not! Below are some of the questions that I started playing with as I was preparing for our last meeting in April:

- *Does certain behaviour make us 'know' things?*
- *Where does knowledge come from?*
- *How is knowledge formed?*
- *How can knowledge be formed/constructed and seen by other people?*

We ended the meeting with me promising to circulate Ramalingam's article (*"I hope it's not as awful as the Snowden one!"* exclaimed Glen. *"No, only one bit I couldn't cope with!"*), and by deciding that the time had come to watch the film "Crash" which, in my view, presented a remarkably experiential view of relationships, prejudice, and the way in which our sympathies and antipathies can fluctuate from moment to moment. I was eager for the CIG to watch this film, given the growing importance that the relational nature of knowledge seemed to be assuming in our conversation. Little did I know at that point how significant this film was to become in my own understanding of events at The Valley Trust, but I'll describe that in Chapter 4.

Part 2

Before the fourth CIG meeting, I wrote and circulated to members of the CIG my first reflection on the inquiry process. In Chapter 1, I described my interest in *"creative analytic writing practices"* (Richardson, 2000:929), and stated that one of my research methods has been writing as inquiry (Richardson, 2000). Indeed, even as I write this

thesis, I am inquiring through the process of writing, as I find that "...every phrase and sentence that is right..." (T S Eliot, 1963:221)³⁴ leads to a fresh insight which needs to be weighed in terms of the whole: Is it relevant? Does it add something? How do I best express it? Before I describe my first writing, I would like to add something about writing as inquiry. I do a lot of writing, but still not as much as I would like to; I write monthly reports which I share with colleagues in the M, E & R Division and members of The Valley Trust's Leadership Team. I created nine writings as part of my research process (all but the last two of which I shared with members of the CIG). And I keep a reflective journal, favoring spiral-bound, black-covered, unlined "Visual Diaries" which also lend themselves to drawings and diagrams. I find the keeping of these journals invaluable, and agree with Janesick (1999), who maintains (p. 506) that "*The notion of a comprehensive reflective journal to address the researcher's Self is critical in qualitative work due to the fact that the researcher is the research instrument.*" I also try to take heed of van Manen's (2006) words when he observes (p. 715) that

It is in the act of reading and writing that insights emerge. The writing of work involves textual material that possesses hermeneutic and interpretive significance. It is precisely in the process of writing that the data of the research are gained as well as interpreted and that the fundamental nature of the research questions is perceived.

Carl Leggo (2001:177-178) says, with reference to asking questions, that "*I do not ask the question in order to answer the question; I ask the question, again and again, in order to*

³⁴ I find the poetry of T S Eliot (especially the *Four Quartets*), a source of unending inspiration. When I'm struggling to find the right word or phrase, I take heart from the following lines from *East Coker* (1963:203):

*So here I am, in the middle way, having had twenty years -
Twenty years largely wasted, the years l'entre deux guerres -
Trying to learn to use words, and every attempt
Is a wholly new start, and a different kind of failure
Because one has only learnt to get the better of words
For the thing one no longer has to say, or the way in which
One is no longer disposed to say it. And so each venture
Is a new beginning, a raid on the inarticulate
With shabby equipment always deteriorating
In the general mess of imprecision of feeling,
Undisciplined squads of emotion.*

know the question. "In a similar way, I do not write in order to document facts and answers - although "facts" do sometimes find their way into my journals and answers (albeit temporary ones) do sometimes seem to emerge; rather, I write (again and again) to inquire, to explore, sometimes to transgress, sometimes to find my way to places where I might otherwise hesitate to go.

With this in mind, I wrote the first reflection and in an e-mail dated 21st May 2007, asked members of the CIG to engage with it:

Dear Colleagues,

I am attaching a brief reflection that I have written on the KM cooperative inquiry process so far. I invite you to read it and comment on it so that my voice is balanced by your voices. Perhaps the best way to include your comments would be as end notes – if you use foot notes it might interfere with the layout of diagrams etc. Alternatively you could e-mail your comments to me (with careful notes as to where you would like me to include them), and I will insert them into the text in a different font, or colour, or box. I would appreciate your comments as soon as possible - perhaps by next Monday 28th May? - as I would then like to forward the modified document to my supervisors.

I apologize for the somewhat messy referencing system. I'm experimenting with EndNote, and haven't really got the hang of it yet...

Please don't hesitate to contact me if you have any questions.

Many thanks,

Clive

I had in mind to see if we could, together, co-create some of the writing related to my research, and in saying this, I had hoped that it would become the CIG's research. When I say that I was interested in co-creating some of the writing, I realize that a lot of writing is co-created in the sense that two or more authors collaborate to produce an article or paper or report that integrates their voices into one seamless account; rather, what I had in mind for these writings was a process in which I documented my thoughts and then circulated this document for other members of the CIG to add their thoughts, present a different perspective, argue, clarify, or otherwise engage with what others had written and in the process create something new *while keeping the individual contributions visible*. Indeed, the document would cease to become a "thing" but would become a flow of ideas, or at least a record of a flow of ideas. In relation to such a process of co-writing, I like

the observation of Brown and Duguid (1996:8) that *"Indeed, writing on writing is both literally and metaphorically an important part of the way meaning is negotiated."*

I introduced the first writing with a short "flow of consciousness" or "timed exercise" section (Goldberg, 1986:8), and also closed the writing with a sort of "afterthought", with both introduction and ending presented in a different font. I did this in an attempt to draw in the reader (Caulley, 2008), and as a way of helping me to clarify my own thoughts and find my way into the writing (Colyar, 2008).

I was delighted with the response. Lungile responded the same day by e-mail; she obviously liked the form of the writing:³⁵

Afternoon Clive;

I have just read your reflections not deeply I'm afraid and I am amazed at what has come up. Over and above the fascination with the content of what has come up and what you've wrote; I am also amazed at the lay-out of the paper. This is one thing that, personally, I seem to struggle with. I may have all this information/knowledge on a particular matter and I fail to put it in a way that truly expresses it and creates free-flow of what I am trying to say.

I don't have comments at this point, I will have to take a copy home with me and read it deeply and meaningfully. More than commenting on it, I wish to learn from this as well.

Many thanks
Lungile

Claudia struggled with it from a technical point of view: *"The flow writing in your attachment came across in a wingdings font at the office; it looked fine at home; initially I thought that was your way of expressing your struggle of making a start with the writing process)".* This highlights one of the problems of using any creative writing form: for one reason or another, one's readers may not be able to access it!

³⁵ Lungile went on to explore the use of creative forms of writing in a report she wrote on her evaluation of The Valley Trust's Community Health Worker programme in the Eastern Cape. In her report, she drew on notes from her journal, she revealed her vulnerability through including her own doubts and concerns, and she incorporated descriptive writing in an attempt to give readers a "sense of place". However, not all colleagues appreciated this innovative approach; one colleague noted that she *"...just couldn't get into the writing!"*

Other members of the group responded over the next few days, and by the time I had received all the comments I was able to compile a document which I thought represented not only my voice, but the voices of other members of the group. (This document is included as Appendix 3.)

Glen also introduced her response in a different font:

Oh-my-goshy-gosh, Clive, what a challenging situation you have got your self into for your PhD research, but how creative and meaningful it will be, even if the CIG falters and wavers along on the wisp of a thread! Your questions have really got me thinking. As I read your reflections, the enormity of the situation hit me full force with what felt like a thunderbolt, between the eyes. But what it was that affected me that way, was that for the first time I really engaged with the situation from your perspective: of having to deliver in terms of the demands and deadlines of an academic study; of how you are so dependent on others. Your context is an organisation in a process of unresolved transition which is reflected at so many different levels that affect all in it. How free are we to make choices in this context?

Lungile also experimented with her response:

I think...

what I know (and therefore consider as knowledge)---- experiences-- change/alteration in view point ---processes of acceptance of new knowledge and therefore what I know----room to influence others/system---

So, it seemed to me, there was an immediate desire to engage with the writing process in a creative and exploratory manner. However, Lungile also raised a concern about the CIG itself and the possibility of the CIG meetings becoming elitist (or at least of being perceived as elitist):

I am worried about the influence of what we learn, is this a personal thing or is it meant to influence the organization entirely? I go around and mention 'Knowledge pyramid' when talking about the data that we collect on the field and I get these blank stares from people. I can't help thinking I am eliminating people once I start mentioning something they don't

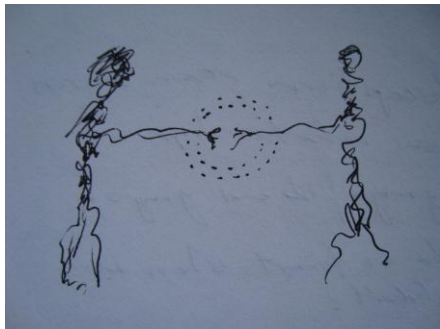
know about. I get a sense from people that at TVT there are these invisible boundaries that segregates the elite, privileged and common 'working folk'. I think that is where terms like 'academics' and 'us' come from.

✂

The fourth CIG meeting, 24th May 2007.

At this meeting of the CIG, the five "regulars" (Gugu, Liz, Glen, Jabu, and me) were joined by Tuki, our Executive Director, and another colleague. As agreed, we watched the film "Crash", but before we did so I introduced the meeting with a drawing which I had created in an attempt to illustrate the complexities of relationship. I had been thinking a lot about knowledge living in relationship, and see that on the morning of 24th May I noted the following in my journal:

I feel enthused by a conversation I've just had with Glen, and feel I can now start the art work side



"Knowledge lives in relationship". Pen sketch.
(Clive Bruzas, 24th May 2007)

of my research: KNOWLEDGE LIVES IN RELATIONSHIP (not captured or harvested!). It's been there all the time, that phrase, but now I can see where it could take me, in the art and the writing. Also, coming to work this morning, I had an image flash into my mind, of two people almost connecting. What a huge amount we need to consider in that moment of connection! What each of us brings with us! The possibilities of what we can co-create! But we have to "touch" each other (Bronowski³⁶ again!) (Journal: 24th May 2007.)

³⁶ I had used a line from Jacob Bronowski's book "The Ascent of Man" as part of the title of my Master of Commerce dissertation. The reference here is to the closing line from the eleventh chapter (Bronowski, 1973:374): "We have to touch people."

The diagram (below) which I used to introduce the fourth CIG meeting was a developed version of the journal sketch on page 64. I pointed out that what I was trying to illustrate



was that we all bring with us our many past experiences, our biases and prejudices, our fears and expectations, and we need to be conscious of these when we enter into relationship and when we are working with the knowledge that lives in relationship. I had watched "Crash" before, and had experienced a bewildering change of sympathies and antipathies for the various characters, and thought that viewing the film might be a way for the CIG to explore the challenges of relationship.

"Knowledge lives in relationship."

Pastel drawing. (*Clive Bruzas, 24th May 2007*)

"Our perceptions can harm us and our relationships," said Tuki, breaking the silence after the film had ended. "Who are the good guys and who are the bad guys? When do we trust when we shouldn't?"

"What's the tie-up between knowledge management and this movie?" asked our colleague.

"Knowledge management is a misnomer," said Glen. "We should use knowledge creation."

"But we need a definition," persisted our colleague. "We need to be clear."

"The issue of context defines information and knowledge," suggested Tuki. "Preconceptions can determine context."

"Knowledge *is* contextual" said Jabu thoughtfully. "In African cultures, knowledge is not contained, one is not given the reasons why, but the facts remain the same. I'm starting to understand the whole thing based on the knowledge pyramid. We cannot force people to share knowledge - people must volunteer."

"And you can only ask questions about what you know already," added our colleague. "We depend on someone else to raise something new. You can only see what you already know. On your own you're limited. You rely on other people for growth."

"That's why I hate questionnaires," remarked Glen, speaking with passion. "I can't choose an answer from what's there! I'm forced into making a choice from something that's not there. But The Valley Trust asks what *we* know: me and Lungi and Clive have been concerned about the KwaXimba³⁷ questionnaire. Clive asked me to wait as Information Management was struggling to analyze the data. The children don't understand the questions. Well of course! It's based on American paradigms. It's the same in our other questionnaires: *we* don't know what the respondents know, so we *interpret* their responses according to *our* knowledge. But in Centocow³⁸ we have engaged in a different way: educators have said they want transport for the schools, and we assumed that it related to problems with distance and bad weather. But they see it as a way of preventing rape. So contexts change - how *do* we collect data?"

The conversation slowed and we closed the meeting. But as we were leaving for home that afternoon, Liz said to me that the film had been an "emotional rollercoaster." The next day

³⁷ At the time of this meeting we were in the process of designing a questionnaire to gather baseline data relating to the HIV and AIDS "knowledge" of learners in some of the schools we were working with. The design of the questionnaire was heavily influenced by our American partner/donor.

³⁸ We have for some years been working in the Centocow area, in the foothills of the Drakensberg, on the Integrated School Community Development Programme (ISCDP). This work recognizes the potential of schools as settings for health promotion, but goes further to build the capacity of both school and community structures for leadership and good governance. Another component of the programme works with educators to establish and maintain "emotionally safe classrooms."

she again mentioned the film, saying that she had found it quite disturbing in parts, and that it had raised several questions for her.

Over the next few days I continued to reflect on the meeting, and in my journal I asked myself:

So what do I expect "everyone" at TVT to "share" in terms of knowing? Surely it's not possible, given our range of work, for everyone to know everything about all the different programmes? What now occurs to me is that there might be one "organizing idea" (?) that links everything, and it goes back to Bockemühl's³⁹ contention that there is only one crisis - a crisis in consciousness. I think we recognized that in Irwin's time. We might have been working with youth, or water, or gardens, but all these were just various manifestations of a different consciousness, an ecological one that saw both the whole and the parts, and dared to hold out an alternative view for a better, more sustainable and gentle world. (Journal: 26th May 2007.)

The fifth CIG meeting, 21st June 2007.

A larger group gathered for the fifth meeting: Jabu, Glen, Liz, Lungile, Gugu, and me, joined for the first time by Thami, Phindiwe, and Claudia. Although this was Claudia's first attendance, we had been talking to each other for some time about knowledge work, to the extent that I even neglected to welcome her as a new member of the group.

Given that there were three new members, we started by reconnecting to the previous meeting before focusing explicitly on Ramalingam's first question: how is knowledge and learning understood in the organization?

"Would anyone like to give us a bit of background on what we've been doing?" I asked, in the hope that someone other than myself would provide the necessary input.

³⁹ Bockemühl (1986).

"I think that when we started off, as I understand it, we had some very free-flowing conversations," answered Glen after a long pause, "and we went all over the place...and bringing up, as I remember it, bringing up some of our issues. I can remember that one of my issues that I wanted to put into the group was my *ongoing* concern about how to share with others what have been rich learnings, rich experiences, in my work. Because very often people say 'Well, look, that report was too long and I really haven't, really been able to engage with it' and then somebody else writes something in a different style and then somebody else says 'Well, I really didn't know what that report was trying to get at'. So the issue of *how* one tries to help the reader to re-create what is being written about...that was just one of the issues."

Other members of the group remembered the knowledge pyramid, and Liz commented on the fact that more and more it seems that knowledge lives *within* us, rather than being captured in "hard copy."

Glen referred back to the film we had viewed during the previous meeting, and noted that "...all that baggage, yes, is there, but in fact it's subject to being changed. And that knowledge is...knowledge is not constant, um, you might capture what people regard as knowledge at that time, but by the time you've finished *writing* it, the person who was talking about that knowledge has already changed and got new knowledge, so that it's a flow, and obviously that's really important to our...in our interventions...in our everyday, but especially in our work, in both research and of course in intervention."

Jabu came back to the question of the role or purpose of the group, noting that we had touched on this in the first meeting but hadn't really established anything definite.

"It's going to become more and more of a key question," I observed, "and I tried to touch on it in that first bit of writing I did, or that *we* ended up doing. Um, I mean what, what is the *authority* of this group, for want of a better word, to change knowledge management

practices within the organization? I mean it's really nice to see how the group has grown a bit and new members have come in, but OK, what do we do with that? We meet again in one month's time. What happens between now and then? You know, Ramalingam's second question goes a little bit more deeply... *'how does knowledge interface with the existing structure of the organization?'* OK, we're only a small part of the organizational structure. *'How do knowledge activities link to existing core functions of the organization?'* OK, so what do we come up with here? How does it influence the writing of appeals? How does it influence practice? How does it influence what goes into the Annual Report? Or the website? How do we feed the proceedings of this work, of this group, into the bigger organization? And that, I guess, that is the thinking behind that figure of eight we've been talking about. All the stuff that happens down the bottom, um, how does it become organizational? And maybe there isn't an answer to that, maybe it never does. I don't know. But I'm proposing that somehow, all the stuff that happens down *here* [pointing to the bottom loop of the figure of eight diagram on a flipchart], you know, all that in different departments, *must* at some point come together at organizational level... What are the learning processes that enable us to take our fragmented experience and make it organizational? But it's a double loop. So up here [pointing to the top loop of the figure of eight], how do we take our learnings out into the bigger world? Whether it's through working with other NGOs, government departments, universities, writing papers onto the website, conferences, whatever the case may be. Influencing policy... advocacy work. And then how do we take the learnings from there back into the organization, to strengthen Valley Trust as a whole? Which again links into our practice. So, one could say our practice lives at the heart of what we're doing. And as an NGO that's what we do. *But*, we have a bigger role, and that is, there's this other whole discourse out there, this whole conversation, an interaction that's going on around health and development, um, and how are we contributing to that? But at the centre, the middle, is this organizational level, which is often a mystery to us."

"I'd like to come back to that question about this group, and the end in mind," said Liz.

"What is it? These are largely 'how' questions, but for me the 'what' questions are important, because if we don't know what we're wanting to achieve, then any road will do."

"OK," I responded quickly, "from *my* point of view, um, which is, um, my key research question as part of this, of my own study, um, bearing in mind that this is *action* research, there is a, um, there's a, there's a desired outcome to it. It's not just to *talk* about knowledge. The question, the research question, is 'How can The Valley Trust integrate its learning processes - integrate - *and* its knowledge creation and sharing so as to improve its effectiveness - OK, its practice - *and* contribute to the broader discourse around health and development'. So there's a central point: that we're wanting to use the learning and knowledge creation work to improve practice, and to contribute more broadly. So that is the action I'm looking for - there's no prescription as to what *form* it will take."

"I think that helps enormously, in terms of where are we going," said Liz, "this is the change that we want. We're looking at the top and bottom..."

"Ja," I affirmed with excitement, "we're looking for a *change*."

"Clive, sorry," said Glen, "would you read your research question again, because it's got three parts to it."

I re-read the question, and Claudia noted that it was also included in my writing. I reminded the CIG that the question was also included in my research proposal, which I had e-mailed to members of the group.

"There was a paragraph in one of those articles which I didn't quite understand," said Claudia. "It was something about a learning organization."

"Any different views on what a 'learning organization' is?" I asked.

Before anyone could respond, Liz said "I have a question coming from the question: 'how will we know that the effectiveness has improved?'"

"OK!" I said, realizing the importance for the group of what Liz was asking. "That's a good question, and I think there's probably a quick answer and a much longer conversation about that. Anyone want to venture a quick answer?"

"What was the question again?" asked Jabu.

Liz repeated her question, and Claudia said "Well, maybe if they're coming out with more than two thirds, or more than a third. Like, say, if your reports, you know, create a more immediate picture of your experience..."

"Hmm..." responded Glen with some hesitation, "no, I wouldn't say so. I would say that if in fact we find things changing in The Valley Trust...because that's how we'll know if it's being effective., because it's being turned into action, and change, rather than just the quality of the reports, or the nature of...whatever."

"What kind of action would indicate whether there's been improvement?" asked Lungile.

"For me," I said, "that's learning for changes in our practice. So, if we have good monitoring and evaluation systems in place, we will tell whether we're being more effective. But without those monitoring and evaluation systems we will have no idea, apart from the gut feel of practitioners. So for me, that's the short answer: it needs to go hand-in-hand with good M and E. That's in the field."

"One way to know," said Glen, "is that we are reflecting and monitoring and evaluating."

"To me, that we're creating and sharing knowledge..." said Jabu...

"As a sign that we're *learning* from the..." interjected Glen...

"That we're learning from this process..." continued Jabu...

"That we're *learning, yes,*" continued Glen. "Through our knowledge creation and our, and our knowledge and sharing, that we're *learning* and *doing* things differently. Well, for me one of the *really* big things, at strategic planning for example, we were saying 'no new programmes...no new *anything*, it has to go through a *team* of managers who will reflect on it and say 'is it...does it, does it *do* what the vision wants us...does it this, does it that, does it the other?' And for me, it needs to go all the way from working more effectively in the field, right up to all our decisions, so that we'll say 'yes, we'll do this, but won't do this, we'll do it maybe but we'll *shift* it to fit into what we *can* shift it to, to do this, but we won't do that part or whatever'. And there are certain *things* that we will understand, 'cause people keep saying, I mean, since 2002 when I started the Development Dialogues, people were saying things but we weren't...but were then saying 'how does that affect the organization?' And, for example, if there are learnings that are coming that, working in a fragmented way is *not* going to achieve our vision - it might do it for one or two people - but it's not going to make a sig...any sort of change to the social *systems* that people are living in. So, piecemeal and fragmentation, for example, we would be deciding that a principle might be, of The Valley Trust, is that we *will not* work in such a way; we will *only* work in such a way that we work in a *developmental* way. That to me is an example of how we'll know."

"But," said Claudia, "we're aiming to achieve our vision through our purpose, through creating processes. Which processes won't enable people to realize their potential? 'Cause that's the ones we can leave out. Which ones are those?"

"Well, we have to learn that still, don't we?" observed Glen. "We have to, we have, that has to become...and then the value...if it's process, a,b,c,d, and we, our learning system is working, we will then say, we are, through our M and E or whatever, are...this is not doing what we are wanting it to do, therefore in future we will not *do* that."

"But how do we *know* it's not doing it?" insisted Claudia. "That process...created dependency."

At that point I asked, "Is it useful to continue this conversation? Um, because it is definitely linked to one part of the aim of the group: becoming more effective. But we're now also starting to head into, um, a deeper discussion about M and E, um, and what are good indicators and process indicators, and outcome indicators and that sort of thing. Um, which I think we need to pick up, but I'm not sure that we have the time for it this afternoon. So should we *flag* it, and..." ["Put it in the parking lot", suggested Jabu]..."Ja, the trouble is one doesn't often return to parking lots! But ja, thanks Jabu, we will definitely do that."

"Um, these, sort of, these meetings tend to go on not much later than half past three, quarter to four," I mentioned, "so I'd, I'd quite like to get to this one as well today, because I think it will take us a little bit further down the road. Um, what I, what I thought might be interesting to do, instead of just going into a broad discussion about this, invite everyone to spend a few minutes just thinking for themselves about one thing they have learned...if everyone could just spend two or three minutes thinking about one thing that you think you've learned from your work over the past, whatever, week, month, year, 10 years - doesn't matter. One thing that you feel you've really learned. And then say *how* you've learned it. What was that learning *process*?"

After we had applied ourselves to the task, I asked if anyone would like to share what they had come up with. Gugu offered to start:

"I only started working with the projects in 2005, but what I've learned so far is that if the agenda for the whole project was not familiar to the community initially, then it's very hard to get the community on board for the results which you had initially thought of. And, another learning for me is that in the whole project team, you don't need to take the project on your own, you need to maybe separate the responsibilities. Maybe the first term of the project you can be the coach, then in the second portion you can mentor the community running the project themselves."

I was trying to take flipchart notes as we went along, and didn't quite catch what Gugu was saying. "I only caught the first one. The second, was it about teamwork?" I asked.

"No. The second one is about the term of the project: I think you need to divide it into two. Half is where you take most of the responsibility, then the next part toward your exit point is where you should give them a chance while you are still there. Because if you leave them while you have been doing for them, when you're going, it's gone."

"And any comments on how you learned that?" I inquired.

"I was involved in a project while I was still a teacher," responded Gugu, "so most of the time we were responsible for the running of the projects toward the exit so when they left us we were able to do it ourselves. But when you take our Umbumbulu project⁴⁰, I think we stayed for a long time in the place and, uh, when we left we could see that they were, they were developed well enough. But the problem is it remains...it just keeps them independent...dependent, I mean. It keeps them dependent, even though we can see that these people have been well-developed, they can run this thing their...themselves, but the thing is we've been there for too long and most of the time we've been doing, we've been providing, like, doing workshops for them, doing everything for them. Only towards our exit

⁴⁰ The project to which Gugu was referring was a Science Development project, as part of which science kits were made available to schools. Staff of The Valley Trust's Whole School Development Department also worked with educators to strengthen their teaching of science.

point did we set the, the team of educators to run the project. But, we *knew* that those teachers could do that thing, but the thing is we had done the thing for too long for them."

"How, how did you reach that, that aha! or discovery?" I probed.

"No, we, recently in our, in our department we just sat down and reflected on how we've been running our projects."

"You mean, reflecting on your practice?" I asked.

"Yes," said Gugu.

"Does anyone else have an example?" I asked.

"I have an example," said Lungile, "but it's, it's not of a project, it's more of a personal thing. I took one of my teachers' focus group discussions. I've been doing a lot of focus group discussions lately, particularly for the Peer Educator programme, and one thing that I've realized, although there are guides that inform or direct the discussion, but I tend to involve myself too much within the programme. Eh, I don't know, maybe in a way I'm sort of like detouring from the guide and putting more of personal things that I would like for...to emerge. And another thing that I, I tend to cope with the things that I know, or I'm most comfortable around, I don't go to, or probe things that I, I don't know much about. Maybe it's the fear that if they, if the people ask me a question I won't be able to answer them, so it's much more easier to ask around the issue that you know best. How I've realized this, I've reflected back on the transcripts that I've typed up, that is how I came to this conclusion."

"It's really seeing yourself again, in the transcript," I suggested. "OK, thank you."

"For me, before I started working in the IT Department," said Phindiwe, joining the conversation for the first time, "when I was thinking about the THPs, the Traditional Health Practitioners, when I was busy working with the Traditional Health Practitioners I was thinking of training the Traditional...but, when I started working, then, I found out that they don't even, they don't even want to be trained by us. Since I started I *never* trained the Traditional Health Practitioners. In our planning, when we are doing the planning with them, they didn't mention the training. There are many things they, they did mention, but, they never mentioned the training. But for me I was thinking that 'Oh, I'm going to work with the Traditional...so now I'm going to do the training'. But when I came there, they didn't even mention training in our planning process."

"So I'm hearing you saying that you, you learned that through that direct engagement with them, the THPs," I said.

"Yes," replied Phindiwe.

"OK," said Thami, also offering her first contribution, "mine is different. I did not think of learning in this context, but I just thought of what...something that I've learned in the past. And I just remembered myself that, um, I learned bookkeeping skills, but it's something that I never ever did. And, eh...the learning process for me, how that happened is that it was through observation, because, eh, now I was going to become part of training community groups. So, I remember I worked closely with Jabu who was running the, the, the course. But it was just sitting there observing her facilitating or training. And then it went on to the second stage where I co-facilitated with her. And somehow, I don't know, I became empowered and I started, I mean, running the course alone. And it was afterwards that I did a course in bookkeeping, and I think it was maybe just to have a certificate, but I could even now start to, um, look at the books of the community and write a report of how the books are, but..."

"I remember Thami's stories about going up to Ingwavuma,"⁴¹ I said with a laugh, "and working with committees around bookkeeping skills! Is there anything that's sort of...*emerging* out of these stories? I don't want to stop anybody else, please feel free to share."

"I might have quite a trivial example," said Liz, "because I went into the last week never mind the last month and years. Um, but it does relate to reflections. At the moment I'm in the process of, um, being second-hand car salesman - we have vehicles up for sale - which means there's all sorts of interesting people coming into my office and dropping things into boxes. Yesterday I had someone come and they came when I was in the middle of doing EFTs, and this person said to me they *really*, really want this one vehicle, and, what they want to do is, when we open the box, they want to *be* there, and whatever the best offer is, they will better it. So I said 'Yeah, yeah' and off they went. Then last night I thought, about three o'clock this morning, I thought 'Ahgggg! Can't do that!' Um, so, this morning I called this person back and I said 'Well, actually, you came when I was really busy and I've thought about it and evidently what you're asking is totally unacceptable. Um, as and when we surface the best offer, um, you could negotiate, or perhaps you want to put in an even better offer yourself, but we're not going to do what you suggested because it's unethical'. So it's a trivial example, but it does have a deeper..."

"What was your, what was your process of learning, do you think?" I asked.

"I think it was stopping and thinking. It was reflection," answered Liz.

"Because," I continued, "it sounds to me like there was a *sudden*..."

⁴¹ Before working in the Social Plant Use Programme, Thami facilitated a number of courses designed to build the skills of committees: basic bookkeeping; the roles and responsibilities of committee members; and developing a constitution.

"Well when I stopped and thought about it..." said Liz, "...there's the other part is...don't do too many things at once! And I just had the courage to say so, because I could just have gone along with..."

"Anybody else have anything they want to share?" I asked.

"I had, my, my, what I've learned," said Jabu, "I think it revolves around what we have said now, maybe in terms of what you were quoting to us earlier, saying that by the time we find the right word to say whatever we wanted to say, we don't have the need to. But this, anyway, for me, revolves around, you know, sometimes we want people to understand, to be at the same understanding as you are. You want them to understand the opportunities that are out there, or maybe understand the content or the procedure, and people they are not, you know, in the same wavelength as you are, and it takes a long time, it takes a long time...and one day, I don't know what happens to them, but one day you find that Oh! they now understand, or understand what you have been trying to, to say, or get them to do, or things like that. So maybe the learning there is that the difference in pace that people, um, process knowledge and information..."

"And how did you come to that realization," I asked.

"I think it would be, it would be reflection, the self-introspection, because sometimes I sit and I, like, I talk to myself and ask myself 'Why, you know, is this person not understanding what I'm trying to do?' And also just hearing other people say, because I think it's, it's this speediness with which we want to, maybe, solve problems or to make things right and stuff like that. You just want to *get there* and do it right! And, you know, just speaking to people...I remember my lecturer was saying she worked in Namibia, I can't remember if she still called it South West Africa, but with the new dispensation, she was saying that the pace of doing things there is very slow. But they do get what they want to do, because they plan properly. And she was saying that in South Africa, we want speedily to fix things and

we don't get anywhere. So it's speaking to people, hearing people saying about things, and stuff like that, that I've come to realize that, you know, we need to pace ourselves and, and just realize that other people are not going at the, the fast pace that we're going at."

"Well, my, my learning," said Glen, "is that paradigm change can be facilitated, but that it cannot be persuaded. Um, and the way in which I learned that, I mean, was last year, is that I was in the position both to observe, *observe* attempts at persuasion of the same sorts of paradigms, and I *observed* processes to facilitate the paradigm shift. So I observed it happening. And then I was in a, in a situation of doing some evaluation to...looking at the changes, and it became very clear that the changes that were coming from the facilitated paradigm shift were so much...they were...the change was *real*. Whereas before people got excited by the *idea*, but it wasn't...didn't become part of them and their lives. They, they, they agreed with it here, but the *real* changes were happening...being facilitated...and then that was borne out with reflection, um..."

"Could I, could I follow yours with mine?" I asked, "because it's linked, I think. Um, I think for me, all that I've really been learning over the past few years is about how easily we talk about change, but how difficult it actually is. You know, if you...it comes from attending strategic planning meetings and practice development programmes, where decisions are taken, and then when you go back and look at them, you realize, well, you know, those decisions haven't been acted upon. Um, and when we did the Facilitator Development Programme we looked at that question of the *will* for change - how do you test the *will* for change? It's very easy to say you're going to do something, but it's actually very difficult to make it happen. And maybe it's the method, Glen, as you were saying, that we use to try and make it happen...but, but for me, you know, I think, once a decision is taken it then needs to become the responsibility of an individual or team, and they need to be given the power or the authority to carry out their mandate, otherwise nothing's going to change."

"Just a thought about the will to change," said Claudia, "if we're talking about an internal paradigm shift, I think then your test for the will to change is like, continued engagement, otherwise people will drop out, if they didn't want it, if they didn't want to go there..."

"Ja, I think that's right," I said, "and I think it comes back to Liz's earlier question about, what is the aim of this group. We can continue engaging as a group for the next five years, and the meetings are really nice and they're interesting and we get excited by the ideas. But what actually changes? How will we know on the ground that something has shifted in terms of the way we learn as an organization and how we work with knowledge?"

"Of course the risk is that *we* change, and leave every...everything else...and go ahead, that, that, that change happens within this process and group," observed Glen thoughtfully. "I mean, I think that when you were doing your, um...when you were introducing the Facilitator Development Programme, the FDP, and you were showing how different *streams* of thought were...you...the way...the more one new one came in, the more it left the other one *behind* and it, it just went on in its own way. But then there was this new stream of thinking, um, ja..."

"I just wanted to add onto that about the change," said Claudia, "which I think goes back to the question about how the reports can..."

"Well," responded Glen, "it's not just reports...it's sharing, yes, but, but Claudia, *can we, can we*, if we report EVER so well, or share EVER so well, if people have, are not experiencing the process, *we, we can't...they, they're not going to, I, you know, so I, I, 'cause I think that's what underlies...I think it's this whole thing of experiencing the change, or experiencing whatever...I mean in the FDP if you remember when we were talking about transformation, we were saying it often comes out of crisis, um, great pain, whatever. So ja, so I think that it's more than just how do we then share it with others...ja...I mean maybe I would - I'm now sort of engaging in a dialogue if that's OK - maybe, maybe what*

then our, our...what we would try to do is, instead of trying to persuade them in a report or sharing...we had this...maybe what we need instead is to find a way of creating a similar process - 'cause we're about creating processes - that will *enable* people to, to have the opportunity to experience that process...a process, and maybe we, out of this we could find a way."

"OK," I said. "So, so coming out of these examples that we've, that we've shared, um, and coming back to that question we started with, 'How is knowledge and learning understood and applied?' is there anything that's come out here that hints to us about how we're understanding learning?"

At this point there was a murmur about the importance of experience, and I tried to note this on the flipchart: "So you're saying there's a strong experiential component to it?"

"We've also talked about reflection," noted Glen, "and I think it was Liz who said, the STOP! and the reflection, because I think that's, that's really quite a key thing, isn't it? It's the stop, you can't keep doing it on the run."

"It's quite interesting," I observed, "that we've put up most of the labels for the action learning diagram, and I think everyone's quite familiar with that, the 'plan', 'implement' - which I guess is experience - and then the 'stop' - which is something we're quite bad at doing -, and 'reflect', and then that's meant to be where 'learning' comes in."

"And then I think afterwards," said Glen, "because so often we stop and reflect, and then go on doing the same thing! If one doesn't regroup...reframe, regroup...reconceptualizing... because I think it more than just planning, it's reconceptualizing where the learning happens..."

"So what I'm picking up from this is that something changes," I said. "The fact that we...we cannot say we've learned something unless something has changed, because otherwise our plan two would be our plan one. I have this idea that, even when you reflect, if you're not taking into account the bigger picture in some way, you can get better and better at doing the wrong thing. You know, reflection doesn't necessarily mean that you end up doing the right thing...you get caught up in this loop of becoming more *efficient* at the wrong thing."

"Because," said Glen, "I think it has to do with how critically conscious one is and how one asks one's questions in that reflection. It's very easy to, to keep in your mindset, if you don't ask yourself the right sorts of questions,"

"So we're saying that the only way we know that a learning has happened is if something changes," I said by way of summary. "Well, what is that 'something', what, what is it in ourselves that can change?"

"A paradigm?" volunteered Claudia tentatively.

"OK," I said, "and what really would that be? A paradigm is the way we see something."

"I know," said Glen. "I understand what you're saying, when you're saying that. Are you struggling to say it? Do you want me to give you my idea of what I think you mean? What I was going to say I think that Claudia is saying when she says that the learning is the change, I mean, yes! You do change, by getting a new way of thinking and understanding. That's what you're saying? But I think that the *change* though, *significant* change, is that you, you, you, your thinking has changed strongly enough to elicit...action change or behaviour change, or *doing* change in some way. It's not enough just to say...'cause I think that's the learning...that's, that's what I was referring to, is that *learning* change that came through persuasion, or didactic teaching...and they were saying 'Ja! Ja! It's right, it's

exciting!' And yes, and, and they were, they were talking about it, *but* the real change though didn't *happen* in the future actions or the behaviour or the something."

"But it's, it's interesting," I added, "there's a guy called van Houten, um, Coenraad van Houten, who writes a lot about adult learning (van Houten, 1995), and he said it's more the struggle with the change that is the learning process than necessarily actually making the change. You might, you might go your whole life, absolutely struggling, day after day, but you still continue the struggle with it - that is your learning process. So, I don't know..."

The conversation continued in a rather desultory way for a while, until I sensed that the meeting was naturally coming to an end. Before we closed, I decided to quickly share two models of learning: Kolb's learning cycle, and van Houten's diagrammatic representation of adult learning through struggling with our individual learning barriers (van Houten, 1995:20). We agreed that we had spent most of the afternoon talking about learning, and that we would like to look in more depth at knowledge when we next met, but for the moment it had been a full afternoon and it was time to close.

It had been a good meeting for me: the group had grown and members were participating well. We had explored our understanding of learning within the context of the organization and our work, and had drawn on the varied experience of group members for this exploration. We had emphasized the importance of both experience and reflection, and had kept coming back to the idea of learning as change, and especially of a change in action. But why did I feel the need to finish the meeting in lecture mode? Why did I need to squeeze in a presentation of two learning models when the members of the group were probably tired? Yes, the two models do excite me, but would it have made any difference if I had held back and shared the models at some other time? I can't say, but when I observe my behaviour at these meetings it does seem to me that I had a tendency to want to share my excitement about what I had been discovering with the rest of the group in a way that was possibly premature, and in so doing, I may well have been guilty of what Jabu had been

describing during this very meeting: the tendency to want others to share one's own excitement and understanding at an inappropriate pace. I can see that in retrospect, but at the time I wanted to press on, and the next meeting was scheduled for 26th July.

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We didn't meet on the scheduled date as I came down with the flu, but the postponement of the sixth meeting allowed me to write and distribute a second reflection to the members of the group. In this reflection I noted that the CIG had realized that "*there are serious discontinuities in the way that The Valley Trust is working with knowledge,*" and I mentioned my "Aha!" when I read Tuomi's (1999) description of the reverse knowledge pyramid - the idea that it's only possible to go out and gather data about something if one *already* knows something about the topic; thus the notion of a one-way flow of data to information to knowledge is misleading - there is always a multi-directional flow. I also reconnected to what the CIG had been discussing, and reported in some detail on the meeting in which we discussed one thing that we had learned from our work. I then went on to write about two recent events which had influenced my thinking about knowledge work: the first was the FDP which I was facilitating at that time, and how I was emphasizing the importance of self-development, the need to work more consciously, and the need to trust a well-designed process. I wrote that

The significance of being part of this facilitator development process (indeed, the experience of carrying the process), has been that it has confirmed for me the importance of trusting in process itself (in the case of the FDP, an admittedly well-planned process), in which nothing is absolute, in which I (as facilitator) need to be awake to myself and to the process, and be able to "read" what is going on: there are no fixed rules and I have had to become increasingly comfortable with paradox and uncertainty, with "both-and" rather than "either-or". As I will try to explain a bit later, these same requirements apply to the way I am now seeing my "knowledge work" (indeed, the process of the FDP is an essential part of my knowledge work.) (Second writing, July 2007:6)

Then there was a reflection day that I convened for the OD Department, and to which I invited colleagues from other departments at The Valley Trust. I was disappointed that the event didn't turn out as I had anticipated, and it was only days later that I realized what had happened; again, it was an example of learning what I already know. I include this somewhat lengthy quote from my second writing (30th July 2007) because it describes, I think, quite clearly what was happening in my own understanding of my relationship to knowledge work:

The reason for convening this event was that the funding which we receive from The Ford Foundation for research into our knowledge creation and sharing processes funds, in part, the work that Glen and Lungile do in programmes coordinated by other departments. The intention is that Glen, Lungile, and I get together to reflect on the work, and explore ways of incorporating their learnings into the work of The Valley Trust as a whole. We had invited colleagues to the reflection day: Tuki had confirmed, as had Thami, Nhlanhla, Xoli, and Phindiwe from Integrated Technology. The venue was set up, tea and muffins ordered. At the last minute, Tuki needed to be somewhere else, and the whole of the Integrated Technology Department was required to collaborate on a last-minute funding proposal. So it was down to Glen, Lungile and myself, plus Fofie (an American student volunteer from Harvard University), and Kate (an American PhD student associated with one of our rehabilitation programmes) to hear the presentations and engage in discussions. I started with a presentation on the model which we are using to explore ways in which learnings from the field can inform and influence what happens at organizational level (the central point in the figure of eight diagram). We then heard from Glen and Lungile about their work in the Izingane Zethu⁴² programme and the Integrated School Community Development Programme (Glen), and the monitoring and evaluation of JHU⁴³-funded HIV and AIDS care and prevention programmes (Lungile). Afterwards, I found the discussion a bit slow: we made some notes on flipchart paper, and we were joined at about 12h00 by Tuki. We reconvened for an hour after lunch, but I found the interactions unsatisfying, although I wouldn't have been able to say why. That feeling of dissatisfaction stayed with me for a few days, until I

⁴² The Izingane Zethu Intervention (IZI) was running in the Centocow and Kranskop areas, and was striving to integrate Early Childhood Development with development processes at both household and community level. There was also a strong focus on supporting people living with disabilities.

⁴³ Johns Hopkins Health Education in South Africa (JHHESA).

came to write my monthly report for June. I found myself trying to understand the reasons for my dissatisfaction, and wondered what it was that I had expected from the reflection day. Suddenly I realized that what I had been expecting was some sort of neat set of "learnings" that we could write up in very concrete form, perhaps collate into a booklet, and share with colleagues, donors, and partners: "knowledge as thing". There I was, champion of "knowledge as flow" looking for something which I have repeatedly questioned the meaning of! At the same time, I realized that the day itself was the process (as the FDP itself is the process), the conversation was the knowledge-in-becoming, and that I had missed it. As T S Eliot noted so poignantly, "We had the experience but missed the meaning". In my monthly report for June, I elaborated on this realization as follows:⁴⁴

So many things seem to be coming together that it's difficult to keep track of the different threads. Much of this report I will develop further for my next piece of writing for the knowledge work collaborative inquiry group (CIG), and much of my current thinking has emerged from working on my portfolio for the facilitator development programme. I find myself asking: As an organization, why do we get caught in the same old traps...the rushed deadlines, the programmes that don't align to our purpose, the decisions that don't get honoured? This is not to say that we haven't changed at all; indeed, there is clearly a groundswell of change happening throughout the organization, in part the result of the practice development programme and the facilitator development programme, but also simply because of colleagues talking to colleagues and, no doubt, reflecting much more deeply on their work. Many of these changes are showing in the way we interact with clients, at the level of what I will loosely call "fieldwork". But as an organization? Are we learning/changing as an organization? Or perhaps I should rather be asking: What *form* might learning at the organizational level take? I have for some years been working with the figure-of-eight diagram, the lemniscate. In doing so, I have come to imagine that there must be some concrete "learnings" that we could, as an organization, write down and share with others. Now, I no longer think that this is necessarily so. I think that I may have been working out of an "onlooker consciousness" (Bortoft, 1996), that was not allowing the phenomena themselves to

⁴⁴ Just in case the reader is struggling with the flow of the writing at this point, let me note that what follows here is a quote within my second writing.

speak - I now think that what could be happening at the centre of the lemniscate is very different to what I had imagined. Not that I hadn't had it in my mind, but I hadn't *learned* it. I think the Aha! came when I was reflecting on our OD Department "learning day", and asked myself what I had really been expecting to emerge from the reports and the discussion. I suddenly realized that expecting something concrete to emerge was the problem - what was important was the phenomenon itself, the conversation, (although I don't think it was really a conversation in the Bohmian sense, more like an analytical discussion).

What am I trying to say here? I think that what happens at the central point of the lemniscate is a very mysterious thing, something that is very difficult to put into words. It is not an analytical activity; it's more like a paradox (and as we know, paradoxes are there to ponder about and meditate on, not to solve) - they point us towards something much deeper, with which we can engage only if we are prepared to accept and practice the very different "ways of knowing" available to us, including the "inspirational knowing" described by Richard Bawden (1999b), and by Peter Reason (2000), John Heron (2001), and Anderson, Braud and Valle (1996). As usual, I find some lines from T S Eliot (1963) helpful in expressing the (almost) inexpressible:

At the still point of the turning world. Neither flesh nor fleshless;
Neither from nor towards; at the still point, there the dance is,
But neither arrest nor movement. And do not call it fixity,
Where past and future are gathered. Neither movement from nor towards,
Neither ascent nor decline. Except for the point, the still point,
There would be no dance, and there is only the dance.

So at the centre of the lemniscate, this constant flow of organizational learning and knowing, lies a still point that is not a collection or distillation of organizational "facts" (however described), but a dance that is never fixed - Eisner's (1997) description of "knowledge as process, a temporary state" - and is therefore in a constant state of becoming. It is the dance of our being together as colleagues. This is why so it is so limiting to rely on technological solutions to knowledge "management" - knowledge does not exist outside of the dance, as the dance cannot be captured or managed. And dance is essentially

relational - we always dance with at least one person, even if it is ourselves. Knowledge lives in relationship. It is by tending to relationship and the opportunities (such as conversations) for nurturing relationship that we will deepen our knowledge work - and this, of course, takes time, the time which we never seem to have... (Second writing, July 2007:6-8).

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The response to my second reflection was nowhere near as satisfying as had been the case with my first reflection. My colleague e-mailed to say that it was "*A very interesting piece and I think the idea about taking time to find out about the other person is very important, especially when you struggle with difficult people, however these people often won't let you have that time!*" Claudia also e-mailed a few thoughts as they occurred to her. I was disappointed by the limited response, but was I surprised? I think, to be honest, that I had been surprised by the extent of the response to my *first* reflection; this limited response to my second reflection was what I had, deep down, been expecting, although I had hoped to be proven wrong. Let me say now that the responses to the rest of my writings were few and far between, and as I write this I recognize a pattern in the way that, even now, I become excited by something I have written and want to share it. I send it to colleagues, and eagerly await a response, only to feel deflated and puzzled when nothing comes back to me. Of course, this is not to say that there are *never* responses: Liz usually offers a short response, and Tuki occasionally responds in some detail. Other colleagues in the Division will infrequently comment on something in one of my monthly reports. But the depth of exchange that I long for is seldom there, that exchange of ideas in which one colleague is stimulated to comment on something which another colleague has written, which in turn spurs a third colleague to add a thought, to annotate a document (by using a coloured highlighter on a hard copy or "track changes" on an electronic version), by scribbling in the margin or perhaps even composing a longer response - these explorations are seldom pursued. Brown and Duguid (1996:1) suggest that "*...documents are much more than just a powerful means for structuring and navigating information space - important*

though that is. They are also a powerful resource for constructing and negotiating social space," and the co-construction of a collegial space in which meaning is co-created through an ongoing conversation is something I continue to strive for. And when it doesn't seem to be happening? Well, then I take pleasure in writing for myself, but the longing for a broader conversation remains.

Part 3

The sixth CIG meeting, 23rd August 2007.

The postponement of the sixth meeting meant that a new date had to be negotiated, always a challenging task at The Valley Trust where everyone's diaries fill up months in advance. However, I found a date which seemed to suit most members of the CIG, and in preparation for the meeting I sent out the following e-mail:

Dear Colleagues,

It seems to me that Thursday 23rd August at 14h00 is fine for members of the Cooperative Inquiry Group. We will meet in Seminar C, and I suggest that we consider two things:

1. What knowledge do we need at The Valley Trust (and we can think of this both in terms of our departments, and the organization as a whole); and
2. How does knowledge interface with the existing structure of the organization? (This is Ramalingam's second question that we were going to address at the July meeting which was cancelled).

As we talk, I would also like us to consider where this research is going: it is intended to be *participatory* action research, so I would like to get some feedback as to how participants see their involvement (Do you feel able to participate freely? Do you feel able to challenge what is said in the group, or what I write? Are you happy to continue participating?); it is also intended to be participatory *action* research, so I would like to get some feedback about the usefulness or practical value of what we have done so far.

I look forward to seeing everyone on Thursday.

Regards,

Clive

Almost all the members of the Group attended this meeting: Liz, Jabu, Tuki, Khantsho, Thami, Phindiwe, Lungile, Glen, Claudia, myself and our colleague. After welcoming the members of the group, I started the meeting by referring to the e-mail which I had sent out in preparation for the meeting

"I gave a bit of thought to what we were doing after the last meeting, and that was partly stimulated by a meeting I had with my supervisors, um, whenever it was - beginning of the month - because I submitted a second piece of writing, which so far Liz has commented on - thanks very much Liz - and I think that one of the things that certainly concerned...well, not concerned my supervisors but really...just, they had a question about it...and that is, how comfortable does everyone feel in the group to fully participate? Um, you know, are we seeing this group truly as a cooperative inquiry group, um, in which we are all, um, striving to, to take the action part of it forward, you know, what, what is going to come out of it? Um, and does everyone feel comfortable to challenge what I'm writing, which is largely *my* perceptions, um, you know, does everyone feel comfortable to say 'this is a load of academic rubbish', or whatever the case may be? Because if we, if we are uncomfortable, then it's not a cooperative inquiry group! Um, and the other thing is, um, are colleagues finding it *practical* enough? Or has it just become, you know, something that we meet once a month to talk about fairly abstract topics? Um, so for that reason I suggested that, um, we, we bear in mind the second question from Ramalingam, which is '*How does knowledge interface with the existing structure of the organization?*' but more importantly, maybe we just need to spend a bit of time looking very practically at what knowledge we think we need at The Valley Trust, what is actually useful knowledge to us, in terms of our own departments or the organization as a whole, just to give us a bit more concrete focus. And then I mentioned some of those other concerns further down in the e-mail."

"I have looked at, at these issues and questions and given them some thought," said Jabu slowly, "but for me it's difficult to make a response, because if I, if I recall, we, we, we don't have a clear list of what this group is supposed to be...we talked about it, I

remember, at our first meeting, but we, we've never come up with any concrete, clear statement of what this group does, and also what is, what is it that we hope to achieve at the end of it."

"So Jabu," I responded, "you're asking for clarity about what this group is trying to achieve?"

"Yes," said Jabu, "and what are our responsibilities?"

"Would anyone like to add anything in addition to that?" I asked.

"I guess we all give input and try to make sense out of it," suggested Claudia after a long silence.

"But why?" I probed. "Input into what?"

"Well, into knowledge, systems, and whatever else, sort of, comes into the conversation," responded Claudia.

"I think we need to be in support of your process, Clive," said Liz. "I mean, we're all in this together, but you are the key player. If it wasn't for you, we wouldn't be here."

"But if it wasn't for you," I responded quickly, "I couldn't do what I'm trying to do, which is why I'm seeing it as a....I'm trying to frame it as a participatory process. 'Cause otherwise the whole methodology, what I was trying to be...very, very different. And you know, for me the key thing is that, that it actually has a, a *practical* outcome, if you want to put it that way, an *action* outcome, um, informed by the fact that, for a long time, we've asked ourselves 'How do we influence things? How do we upscale?' And one way of doing that is through being more conscious about what we're learning and what we know, and finding ways

of sharing that more widely. Um, it has, it has all sorts of implications for the future of the organization. I'm certain...my view is that NGOs are not going to be funded for much longer for just going out there and doing stuff. So where is it in future that we're going to add value? It's not going to be by going out there and just implementing stuff. And one of the ways that I think we can add value is through knowledge work, um..."

"For me," said Glen, "one of the most important purposes is that it's the *process* of our sitting here together and thinking together and bringing ideas together. It's the *process* of doing that which for me is so important, and I think that...the way I see it is that, that process is what will also largely feed into change in Valley Trust. Because the more of us are talking, the more of us are sharing and thinking together, the more the whole, um, environment and climate will change."

"I also think it's quite a challenging topic," said our colleague, "because we're also in an era of people wanting, at the touch of a button, a result. Now just going back to using the DHER⁴⁵ again...for five years nothing's really happened, and now we've finally got KZN province in on it, but they still want, at the touch of a button, the answers rather than saying...so they still want a technology to help them rather than finding the time to say, 'Hang on, this is actually where the problem lies.' And then they want us to give them a miracle which I'm getting quite wary about. I'm getting more and more e-mails from them....when you look at your children as well, they just want something instantly, you know, almost...no one's going behind the scenes and thinking and taking time, and they're looking more and more to technology to answer that."

"Do you think that's because they've never really thought about what information and knowledge mean?" I asked.

⁴⁵ The Valley Trust for some years supported the Department of Health in KwaZulu-Natal with the District Health Expenditure Review (DHER), but I felt that the Department could have made better *use* of the information that was generated.

"I think it's...I really do," said our colleague, "because, I mean, you know, I've been having to step back because my challenge now is working with this municipality that's saying 'Set up a system that'll work' and I'm saying 'Now hang on! I don't have that ! I don't have that answer, I don't have the experience, I need to understand where you are coming from and you need to understand where's the problem'. Because they can't even tell me. So, it's a new thing for me, um, but I think it's a new thing for everybody, but they're always expecting technology to give us...they're not taking time to think where is the real problem, because they don't have the time, their pressure's on them to report, it's actually 44 reports in a month, where do you find time to generate...? So I don't think people are...maybe in this process I can understand more about taking a step back and maybe I can facilitate other people to start taking a step back and thinking, you know, around 'This is where we start, and move up', rather than thinking of a quick output and, 'With this result this is where you go', because that's easy to get into the habit of doing. I need to understand a bit more and hopefully to facilitate the process better."

"I'm just wondering," added Tuki, "if we could not use what we are doing now to maybe try to explain to them that, that, to...giving them more information does not actually mean that it will solve the problem. For them they think that they need more. The question would be: 'Have they learned to transform what they have into knowledge?'"

"To add to that, Tuki," said our colleague, "is I've literally been asked if I can make a machine that generates a report. So the whole reporting...because they have to generate so many reports they want us to go so far as to get something that will generate the report. Now how...a report...we can generate statistics and answers, but to generate reporting and all that...but that's where they're at."

"But," cautioned Khantsho, "that's where we're at as well. I've had, um, things, especially with, with another colleague's work, that he would produce stats and that people would like him to give meaning to what he has produced. And who gives meaning to those things? Is it

his work? Or is it the person who works in the context and starts to apply those...It's not just in terms of technology but in terms of expectations."

"I think there's a parallel here though in education, because education has changed so much," said Glen. "Because at one stage we had to learn these things ourselves, as Tuki says, and then we got to a stage where we got a machine to do it quickly. And people, I think, not understanding what those machines are doing, but if we look at the change in education now, we don't...children are not expected to learn so many facts, so much information as they were. Education has become, has shifted to how to *use* information. I mean from grade, grade R, the children are starting projects, I mean, even before they get to, you know, what used to be the first year of formal school they're having to think and problem solve. Because I think we've recognized that failure to understand..."

"I find that whole hierarchy of, um, data, information, knowledge very interesting," said Liz, "because it's not a kind of straight line, and I liked what the paper you gave us, um, as Zeleny says, '*Although information is an enhanced form of data knowledge is not an enhanced form of information,*' and I think there's a lot of food for thought there for us...because this is knowledge management, which is something a little different from the data and information...it's interesting."

"I think that whole thing...that we still crave certainty," I said, "and um, I think it's, um, Eliot Eisner, who writes on education, says that if you think knowledge is a fluid thing, that it's not fixed, that it's changing all the time, it's terribly scary. Because what do you base your world upon? Whereas if you think you've gathered the data and the information and you've got it and it's unchangeable, you know, it's that whole thing, '*knowledge as thing*', you can go back to it, you can refer to it. And it is true, but knowledge is also a flow, it's meaning that moves between people and situations and changes. And, and that's what people struggle to grasp. Um, even if you could come up with a magic machine that would work once

to generate one set of reports, when the context changes it's not going to be able to do that any more."

"But," said our colleague, "also, um, picking up some of the problems that Khantsho said, um, where we act as a department too, that we often come in to do, like a baseline, but we're not involved from the beginning to understand the community or brought in to listen to them and all that sort of thing, so we're brought in at a different level to do this baseline and then we have to put an interpretation on that which is...if we were brought in to listen to them...would be stronger. I need to insist that we come in right from the beginning, be more insistent on that. But I'm just saying, that's often where we've been in the past. And then our reflection is not a true reflection, it's just a reflection on that information, that data, as such. But it could be built up with the knowledge from the community and be more interpretive, and that's in a way, Khantsho, what I was on to, saying that to a degree it *is* our responsibility to report back on information because we've been playing with it, *but*, we can't do it by ourselves, we've got to work with you. There has to be closer work between the two departments."

"So what sort of information and knowledge do you think we're working with at Valley Trust?" I asked. "I mean, given as an organization, that we might also have clients who might have very different needs, um, you know..."

"It's very different between different departments," suggested Liz. "It's a reflection of our diversity, isn't it? In Thami's department it will be very different to our colleague's department."

"I don't know," said our colleague. "There must be a *core* commonality of understanding...we're all going to work with information and obviously it's going to be different, um, there must be some, some common element. That's what I'm hoping to get out from this, there...that I can share when I'm going out because they're not expecting

just information and they're wanting to understand. How do I work with them in order to facilitate them in understanding information, turning it into knowledge, making things work with that information. There must be a similar, core, way of doing it that we would do here at Valley Trust - amongst all the departments - that would be adaptable for everybody."

"Is it possible to have a core?" asked Glen. "Anything, because if you actually think, I mean, we used to think that there was such things as...I mean I can remember...one used to think there was a *body of knowledge* which, when you had learned that, you graduated from a discipline. But you had to learn that, it was almost...But I think that the technology age has shown that there, that knowledge is so vast. And I think we then began to realize that what is knowledge in *this* context is not relevant knowledge in *that* context because people, people construct reality differently. And, and with...and that's reflected for example in the second theory of knowledge, of knowledge construction, so if knowledge changes in different contexts for different people, apart from historically when it's changed anyway, then I don't know that we are going to be able to say that we...maybe it's a deeper, underlying process that is the core."

"Michael Patton has an interesting question that he puts to people sometimes," I said.

"*'What do you not know, that if you did know, would make a big difference in your life?'*

Often people do know that they don't know...this...*'Gee, if I just knew that!'* You know, just, just think about our work in HIV and AIDS...you know, we design all these prevention programmes, but if we, if we actually *knew* why people take the risks that they do, maybe we would design very different programmes."

"We say we don't know but maybe we do know!" observed Claudia.

"Maybe we do," I acknowledged.

"Well," said our colleague, "reading the Peer Education⁴⁶ report, I think we do know."

"But if we're saying that meaning moves between people?" asked Claudia. "Which is interesting, because meaning is...how does meaning...come into being? Everyone makes their own meaning. Then how does it flow between people?"

"So meaning is essentially an individual thing?" I asked, trying to understand Claudia's question.

"Isn't it a relationship thing?" asked Khantsho. "Don't you think so?"

"I don't know," said Claudia. "Will something mean the same thing to me as to you?"

"Not necessarily," responded Khantsho. "But it is..."

"But you can create a shared meaning," I interjected. "You will still have your meaning, and Khantsho will still have hers, but then you can create, or co-create..."

"...and understand each other" said Glen, finishing the sentence.

"But coming back to your question, Clive," said our colleague, "about if we only knew beforehand. Um, I'd answer, just from the experience of reading the Peer Education report, if somebody wants to do something, at the end of the day, they'll make any excuse to do it. At the end of the day they have made a decision to do that, and no matter what you knew to try and stop them, they will find an excuse somehow."

"You're saying we don't necessarily make rational decisions based on knowledge?" I asked.

⁴⁶ The Valley Trust had been contracted by the Department of Education to conduct an evaluation of a Peer Education Programme in selected schools in KwaZulu-Natal.

"Well" said our colleague," just looking at some of the responses from the kids, why they're having sex so young... '*Well I've grown a beard now, so it's time for me to have sex*', you know, and then another one, completely different. So if they want it, they will find a reason why they should be having it. And I'm just saying, that question, '*If you knew something beforehand*' to try and stop them, I don't think...I'm just saying in some cases I don't think you can stop somebody by knowing..."

"No," I said, "I don't think you'll stop it, um, but I think it might help us re-conceptualize what we go out there and do."

"But isn't what our colleague is saying what is underlying so much of the criticism about so many of the HIV and AIDS prevention programmes?" asked Glen. "Is that... people, and in fact...the old idea in primary health care of health education...you just tell people and their behaviour will change. But that's why primary health care as it stands was replaced by health promotion, because people *don't* change."

"Just coming back to that question," I said, "you know, 'What knowledge do we need at The Valley Trust', um, and picking up on what our colleague was saying about what's coming out of that Peer Education study, um, how will, or *will*, the results of that work be shared within the organization? Because maybe there's stuff in there which can inform other work."

"I think it's got to," said our colleague. "What is coming out has been, well, an eye-opener for me, and I'm sure a lot of people will feel it won't be an eye-opener, but, um, it certainly was for me. Obviously, it's a report for the Department of Education, so we can't use it in any way, but understanding the youth has been just incredible. This is how they're perceiving things and, um..."

"When there's something important like that, how *do* we share it?" asked Liz. "Because it feels to me, and maybe it's just me, that there's an awful lot of interesting and amazing and valuable...you know, it's only a kind of 'passage talk' that I get - and I'm very grateful for the passage talk - but it's not, um, it's not the full spectrum, and, and how do we share that? How best should it be channeled or available?"

"We do share enough reports," said our colleague, "but this report is going on to 200 pages, no one's going to sit and read 200 pages..."

"At one of our...I think it was the first knowledge management you came to," said Glen, "we were actually trying to talk about that, because we're not just saying it's reports, but in fact it seems as though...the question we asked at that one was, 'Do the reports only make meaning to the people who have written them and been engaging in the process of that. And it's been something that has really, really been playing in my mind so much now, in fact for a year or more, 'cause what *is* it that one can do? What *can* one change? How does one write differently or communicate differently?"

"I think the first move is...communicate," said our colleague, "start by verbal communication and take it from there, but I really think we have to have a slot where we start to communicate on projects."

"I agree with you," said Liz, "it's, it's the verbal, it's the interaction, it's not just the piece of paper...it's you and me and, you know, it's a relationship."

"But that's also why you started the Open Meeting, Clive, and you called it an Open Meeting," said Glen. "You started it, I know, before I got here, but just for that very purpose, as I understand it. And this is, I think, why when we were surveying⁴⁷ the

⁴⁷ I will write more about the Open Meetings (or, as they came to be called, "All Staff meetings") later in my thesis, but I initiated these meetings for all staff in order to share what was happening in the organization. Since their inception there has been debate about whether or not to make them

organization and we were saying, you know, should it be compulsory or shouldn't it, and people were saying '*People don't come if it's not compulsory*', and I think that's why in OD we were very disappointed that we had to have something become compulsory in order to have this, what our colleague is talking about."

"Just in terms of that figure of eight, which may or may not be useful...I think the verbal conversations are great," I said, "and I think they're a foundational aspect of sharing experience and knowledge, um, and we can do that with partners as well, but do we have a role as an organization for doing something more formally, whether it's on DVD or CD or written on paper which we can send out for other people to refer to? You know, this tradition of publishing, it's an awful way of, of trying to get experiences shared, because by the time it eventually gets out it's probably five years after you wrote it or something like that, or it's out of date. But what can we do to share our learnings, or whatever you want to call it, with, say, a group in Namibia? What do we do?"

"I think, I think..."said Tuki, "we could do two things. One would be...how do we get to a stage where people say that what we know or have experienced, is actually valuable. Because for example if you want to go...if you want to get information, how trustworthy is your source? The second issue would be how do we gather information? How do we generate knowledge? Do we really know what we know?"

"There's one thing that worries me a little bit about the verbal communication," I said, "there's a paper I've shared with some colleagues, um, which touches on this Japanese idea of what they call the *ba* - it's a word which means supportive, creative space, um, both in, literally in time and in space, in which we get together and we share experience and ideas and what have you. And I think if one uses that idea there are several different *ba* operating at The Valley Trust - there's this one, there's the Managers' OD Meeting we had

compulsory, and we have from time to time undertaken surveys to establish what colleagues think about this. Open Meetings later became known as All Staff meetings.

this morning, there's the Open Meeting, um, there's maybe action learning groups. And all those have different participants, some of them might overlap, so...the seeds that are sown in one of those might go in one particular direction, the seeds in another one might be heading in another direction. At what point and how, do we say, 'Well OK, *as an organization*, this is what we're sharing?'"

"I think," said Glen, following my train of thought, "that another really important aspect is for there...for when...with the knowledge, to actually...for people to be clear at Valley Trust that this is what the organization has *adopted* or is *promoting* in order to, um, to achieve the vision, and that this is the *organizational* thinking. I think that our organization is very big and it's got a long history, and I think there are all sorts of things that have been...and I think that was the big Aha! at that first strategic planning meeting, before Practice Development, when Davine asked us '*What is the core business?*' And they couldn't even say that - it took us 18 months to be able to answer that question. And I think that we need to be able to develop Valley Trust knowledge that says 'This is our vision, and this is what we see as an organization'. There can be individual differences, but I think that would help to guide the way we work."

"I think," said Tuki, "I was going to say that a challenge we are currently facing...who is managing this project? If it is always seen as an isolated project which is done by Clive, there will be the perception that if Clive wasn't there, it wouldn't be there, or if Clive disappears it will disappear with Clive. Or if funding comes to an end it also comes to an end. Which says, where does it fit? And also, I know that Clive said let it be voluntary because if it is made compulsory people shy away. Then the question is, if it is voluntary, how do people see it as a critical aspect of our work? We say it is critical, but your participation is voluntary in it. The second is, how do we feed back the discussion we have had around this table to everybody else? It may not happen now, because we are at an early stage, but the question is, at what stage do we start making knowledge management part of, or a driver for, the work that we do? So that people don't think of it as one of those

things that The Valley Trust sometimes does, but as part of the core driver, or support for what we do."

"The whole knowledge thing is a big paradox," I said, "and a paradox is never an either-or, it's a both-and. Glen referred to a body of knowledge, and when you think about it, a body...when we talk about a body in other terms, it's something dead. So as soon as we try and, um, codify something, you know, give it a form, structure, categorize it, capture it, um, write it up, in a way, it's dead. It's, it's not current and alive. Um, but if we, if we constantly work with stuff which is in flow, in flux, in movement, we constantly have to be talking to each other, and we know that that is very difficult in the organization - we were talking about it this morning. So somewhere in this paradox we need to find both ways to um, to give knowledge at least some temporary form that we can more readily share, but at the same time realize that tomorrow it's going to be different, and, you know, live with that ambiguity and uncertainty."

"I think it's important to recognize the complexity of it," said Liz. "This is not a simple thing...the original Valley Trust was a socio-medical project for the promotion of health which was quite simple and straightforward, but out of that has grown what is now a complex organization. I think, I think some of us at The Valley Trust *battle* with the complexity, which is also part of this whole body of knowledge. And I'm not for a moment suggesting that it should become simple but I think to recognize and to...as far as enablement...to engage with the wider body at the Open Meeting, what we used to call the All Staff Meeting, so that it's not just an elitist animal in the organization."

"It's interesting," I said, "one of the few things I read right through when I get it is the Newsletter, and it was so nice to get that coloured Newsletter, you could see the pictures, you could read the writing...and yet I know how Sane battles to get colleagues to write articles for it. You know, she's sometimes tearing her hair out that, you know, people have either promised stuff and haven't written it, or nobody had promised anything. And you

know, we do have these *vehicles*, for want of a better word...we can share with each other, we can tell stories, we can write a paragraph, it doesn't take long to read, we can do it in whatever language we want. It's such a wonderful opportunity but it's so difficult to get done."

"It's the same for Claudia," said our colleague, "when she wants an update for the website...every time, Claudia has to beg: 'Come people, give us a website update'".

"A thought has suddenly occurred to me," I said. "We started off this, um, this meeting by saying 'Well, where's the plan, what are we actually going to do?' Would it be possible to, to decide that we are going to write for the Newsletter...I don't know what the budget is, I don't know how it operates..."

"The last time I spoke to Sane, I think she said she was going for one every two months," said Tuki.

"I'm really concerned that unless we decide on one thing that we're going to do, which might, um, improve something in the organization," I said, "we're going to keep on meeting once a month and talking, so I just thought of the Newsletter as something that wouldn't take a lot of extra effort to contribute to".

"As a way of knowledge sharing?" asked our colleague.

"Yes," I answered. "So should I go and have a chat to her?"

"Couldn't we always have an article about this whole process," said our colleague, "about...as we develop in knowledge, maybe starting off with the eight questions, get people to think about...so it's not just us sharing, but we can share it outside using the magazine...just one

little article each time on knowledge...you know, as we're moving along and understanding, so we're sharing that development with the rest of The Valley Trust..."⁴⁸

I glanced at my watch, and noticed that it was time to wrap up. "I'm not sure how useful this session was," I said, "if anyone wants to share a few thoughts before we close..?"

"Clive, just one thing I'd also like to say," said Glen, "you've shared a couple of papers with us criticizing the concept of knowledge management, and some of the papers say that it's dead and it never actually really, um, was really alive and mature and well. And as we've been talking, it really has struck me that the name 'knowledge management' in this group is really, I think it's actually setting...I think it's setting the conditions for confusion, because I think it's so similar to the concept of, to the name 'info management' and I think that it's going to...I think that's part of the danger. And I'm sure that when Department of Health asks us to wave the magic wand it's the same sort of thing, I mean the idea of knowledge management, of info management. And I, for me, what we are talking about is knowledge *creation*, and then yes, there is a management part to it, but it's the knowledge creation that's the important thing, and I just wonder if we could change that, because it's rather like saying that the important thing is the, the filing cabinet in which you keep the knowledge instead of saying it's the creation and the using of the knowledge that's so important."

With this thought on the language we use to describe our engagement with knowledge, we closed the meeting, agreeing to convene again on 28th September. Again, I was pleased with the meeting; although on the one hand we did not seem to be making much progress in addressing directly the questions posed by Ramalingam, which I had seen as one possible organizing framework for the CIG meetings, the conversation did seem to me to be holding together, and several key issues relating to knowledge work in general, and to knowledge

⁴⁸ We did manage to get one short article on knowledge work and the CIG into a Newsletter, but the sporadic nature of the Newsletter's appearance made it difficult to maintain any continuity, so the possibility was not pursued.

work at The Valley Trust in particular, were emerging. I was especially pleased that in this meeting we had started to discuss the need to think about "organizational knowledge"⁴⁹ - that knowledge which lives at the centre of the figure of eight - as well as the need for the CIG conversation to start extending into the organization. And Glen had raised the important question of the language we use in relation to knowledge work.



Before the next CIG meeting, I shared with other members of the group an article by Russell and Ison (2005) which had had a significant influence on the way in which I was coming to understand the work of the group, as well as on the way in which I thought about organizational change. In this article, the authors emphasize not only the importance of relationship to learning and change (an idea with which the CIG was already working), but also described the important contribution of conversation to learning and change. Indeed, the authors state (p. 132) that for them, conversations

...were characterized by the desire to create a relational space informed by the desire to make manifest relationships - to show how complex and even contradictory elements (especially the people involved) are fluidly held together.

They also draw on the work of Krippendorff (1993) to introduce a dance-ritual metaphor for conversation, which implies that those who convene and facilitate conversations can be regarded as choreographers.

The importance of conversation was something that Glen and I had been discussing for some time. We had both been influenced by the work of David Bohm, as well as by the writing of Isaacs (1999) and Wheatley (1999, 2001). However, the idea of conversation as a

⁴⁹ In using the term "organizational knowledge", I am not suggesting that organizations know anything - it is within the organization's staff and stakeholders, and more especially in the relationships between them, that knowledge lives. However, I am using the term as a form of shorthand to describe those aspects of knowledge which have been debated and agreed (or perhaps better, where meaning has been co-created) so that, as an organization, we could confidently express an organizational view.

dance was a new and intriguing one.⁵⁰ I should perhaps mention at this point that I don't dance, so my experience of most forms of dance are limited to watching others dance and having once braved a beginners' course on ballroom dancing. Nevertheless I became excited by the idea of using the to-and-fro movement of dance to represent the back and forth flow of conversation, although I was a bit concerned that most of the standard dance forms with which I was familiar seemed too structured to adequately describe the spontaneity and surprises that I associated with a good conversation. I mentioned my reservations to Glen, who said that in her view the tango would provide the ideal dance metaphor, and so I started to explore this dance by listening to the tangos of Astor Piazzolla. (In the electronic version of this thesis, click on the folder labeled "Piazzolla" to listen to one of Piazzolla's particularly evocative tangos: *Solitude*). I was further guided in my explorations of tango by an article by Olszewski (2008), in which he observes (p. 65) that *"The tango is a social dance and, as such, is necessarily predicated upon somatic interaction - specifically, the kinetic relationship between leader and follower."* On the same page, he adds that

Almost all social dances are, to some degree, improvised; however, compared to other social dances, tango is particularly spontaneous. Most ballroom dances, for instance, teach dance moves or "steps" as patterns, often consisting of specified foot and body movements over the course of three, four, six or eight beats. In contrast, the Argentinean tango teaches no patterns. Instead, dancers are instructed about basic movements such as single steps and turns, and then encouraged to piece these movements together creatively.

Still, I felt a bit of a fraud because I was engaging with the tango as a listener/observer rather than as a dancer, but was somewhat reassured when I read the cover notes on the "Best of Astor Piazzolla" double CD that Piazzolla himself *"...was always convinced that tango was music to listen to and not to dance to."* Would the metaphor hold for me?

⁵⁰ I had, of course, already encountered T S Eliot's reference to the "the dance" and found it extremely satisfying (see the quote on page 87). However, the idea of dance lived with me as a concept rather than as a physical reality.

The seventh CIG meeting, 28th September 2007.

A smaller group convened for the meeting on 28th September: Glen, Jabu, Claudia, Liz, Thami and me. We had been meeting as a cooperative inquiry group for six months, and I thought that it might be helpful to review our progress and invite members to express their feelings about the group and what it was (or wasn't achieving). I therefore invited the group to engage with four questions:

1. What is the knowledge work that the CIG is setting out to do?
2. What has the work of the CIG meant to you, personally?
3. What do you think the work of the CIG has meant to The Valley Trust?
4. What do you think we should do next?

We broke into two groups for this exercise, and then reconvened to share our conversations.

"How was that?" I asked. "Did you manage to come up with anything?"

"Ja, we found it interesting," said Liz. "We sorted out all sorts of things!"

"Do you want to go through it question by question?" I asked. "Or did you find that it all merged into..."

"Ours merged," said Glen decisively.

"We did ours more or less question by question," said Liz. "First of all we talked about the knowledge, and how do we use it...do we use it? Um, and then we talked about knowledge in relationship, and knowledge being in people, and there's tacit knowledge, and the wonderful point about where did it come from - the people we work with. Then we talked about the

journey of discovery, um, as being what the group is setting out to do...is that we are on a journey of discovery. Um, unpacking what it's all about. Do you want to add to that?"

"Mmm, ja," said Claudia, "maybe if we're not using it - because we asked 'Are we using it?' - if we're not using it...why not?"

After a pause I asked, "Are you planning to unpack that a bit more..?"

"Well," said Liz, "that probably comes out in question four, because we're on a journey, we're not totally clear about everything and we have some suggestions."

"We started off with the pyramid," said Glen, "what the group was setting out to do, what you were expecting..."

"Ja, ja," said Jabu, "we started off with the knowledge pyramid that, um, my expectation was...it's difficult to answer the question because we, we, we haven't worked out what, what is this group...we have talked about it but we don't have any...but what I was saying was for me, perhaps for the group - it would help the group - to understand the levels of the pyramid, if we took for instance one project and tried and put it into that, that pyramid. Say for instance take one project and you have data, this is data for this project, this is information, this is knowledge, and this is wisdom, just in terms of...just for a basic understanding of what we are talking about when we are talking about knowledge management. And then we went on to, um, to talk about wisdom, the limitation of, of...people have written about knowledge management before...why limit it to that step: knowledge management? Why is it that we're not taking it to the next level: wisdom? This group also can take knowledge to the next level: wisdom."

"And I think also what I heard you say," said Glen, "I think I heard you say 'How do we do that?'...I think that was a lot of what you were tussling with, is *how* do we actually deepen it?"

"How do we deepen...what?" I asked.

"Well, just generally," said Glen. "I mean, we, we talked a lot about...about, we also talked about the, the, um, current, um, sort of misinterpretation of what knowledge is...because of the, because we're right into the high-tech age...the technology age...and it's so...people tend to think that knowledge is what gets put into databases. Um, and then...but that pyramid tells us it's never...it's, it's...at best it can only be in a database...information because it becomes organized. But then how do you deepen...what do you do...I think that was the...that's why you were saying if you could look at a project then maybe you actually see how to deepen...because you kept asking and then you also said 'Why can't we go on and say 'OK, now we've got to wisdom', um, maybe wisdom is something that's just too...too... what? Perhaps...to be able even to ...I don't know...so, ja. And then, and then, um, because I was then saying, in terms of what the group is setting out to do...I think that we agreed that we were hoping that it would be - rather like you were talking about - a discovery, but that it would be joint inquiry on an issue that would help us. And then these were some of my points...to create a common understanding, shared understanding about it, so that we don't have these...we don't keep bumping when we're trying to talk together, um, and that people think now that they've got this that it's...that's the finish, but in fact it's just the beginning, so that we can create a common understanding in the organization which we can then apply to our practice to deepen it. And I think Jabu made the very important...thing is to help us, and that, that we would like to see it helping us share and use knowledge, I think that was a very big important thing. Um, ja, and...we were talking about the difficulties of sharing and we went...we looked at these two angels⁵¹ and their clouds of 'stuff', um, and

⁵¹ Glen was referring here to the two figures in the drawing that I had introduced into the fourth CIG meeting.

then that, that when you ask questions and things, what gets put into the space is just, either what just comes to mind quickly or, or what the person thinks you mean, and they don't even begin to tap into all the other...um, we had an example in the FDP⁵² last week...but when we...we weren't intentionally trying to go deeper, but when we...in the whole process we *were* going deeper...and we discovered that somebody who said '*No, nothing had changed at all*' has actually had the most *profound* change. Because what she was interpreting, she thought it was in terms of her work, she had said '*No, I still just do admin work, but I am excited because there is a bit of a change because I'm now going to be exposed to facilitation in work as well.*' But when we went on, she was actually talking about the fact that she stopped being a silent person and she stopped being...inside, she's had her confidence...confidence to talk out her ideas whereas before she kept them to herself etcetera, etcetera. So we were saying, Jabu was saying, 'Well if we'd just had a chat we might have picked it up', but we can't...when we're sharing our work we can't stop and have a chat with everybody. And I think the issue about having a chat is in the whole context of relationship, which in fact is what this group has meant to me. It's been a...I won't quite say life-changing, but it has been one of the most significant experiences...was that choreographer-chorographer paper...to me it was much, much more than theory, um, because...there's such synchronicity in my life around that. Because things that I've struggled to share with others, I've had it there and here and here, and I've never been able to feel I was sharing, getting the ideas across, and it's just quite remarkable. And a report I was actually finding hard to get down to write...I know exactly what I want to say, I just now need to sit and do it, because it's changed so much."⁵³

"And Clive," continued Glen, "I mean, we didn't really get to talk about what it has meant to The Valley Trust, but from the FDP I'd like to say, I don't think it's only this group, but I think there are processes in The Valley Trust...because it was so clear that people are

⁵² Glen was at that time facilitating one of the groups on the FDP.

⁵³ I have included this rather lengthy contribution from Glen because it reflects something of the excitement with which she was describing her experience of being a member of the group. At the same time, it shows that she was struggling to express what the group had meant to her, perhaps echoing Polanyi's (1967:4) assertion that "*...we can know more than we can tell.*"

talking...the way people are talking...about the changes in terms of consciousness, in terms of insight, people are asking questions. And I think it's a combination...I mean, I think this feeds into it, because people *do* talk from here afterwards and then they interact with others. So I think it's interacting with other processes, and..."

"But for me," said Thami, "to join this group...I was asking myself a question...what am I doing with the knowledge that I am, um, sort of, when working, getting out there, and what does it mean? How am I using it? I thought maybe....knowledge management...I need to run away from that word, but ja, I think that was my main aim to join..."

"I think we have...there is knowledge at The Valley Trust," said Jabu, "but there is no coordinating structure for, for a person like me to go to this source and use this knowledge."

"For me," said Liz, "it's also an opportunity to engage with the broader...and deeper aspects of the work, because much of the work that I do is in support of other work that is going on which I'm not always fully conscious of. So this has been an opportunity to engage with the readings, and with the group and to get a sense of the greater Valley Trust body of knowledge or...I don't know, it doesn't live in a box, it's, it's in relationships and this is an opportunity to broaden and deepen..."

"We got a bit concerned in terms of question three," continued Liz, "and we think it might even lead into question four. Because how is the...how is this reaching the rest of the organization is not entirely clear, and yet it's such an important process that we would like to, to find ways in which we can, um, for everybody at Valley Trust to engage in it and we thought perhaps if there's a way of simplifying what seems to be quite a complex, um, subject. And we don't have answers yet for that, but the direction that we've talked about going in terms of way forward..."

"We started talking about this, too," said Glen, "but in a different way, in terms of reporting the deeper parts of our work. But Liz, to me I keep coming up against this...thing...that, because it's not in a box, and there isn't a place where it can be - as Jabu says, where you can go to find it - because it...I think there was a...some of the readings we were having, saying that that's information. So...and *because* it's in relationship...because, I mean, for a long time now I have been preferring *group* work, because it's in the relationship, it's in the give and take, for a long time, also, I have stopped being able to write a lecture, like I used to have to do every day. Because I couldn't *do* it until I was with the people and know roughly what I would be doing. But it would go in whichever direction that it went in the relationship of the participants and me, even, even in a lecturing situation. One would know that roughly if you've undertaken to lecture on certain things you would get those things in, um, and it's become increasingly difficult to be able to do that without people there. And when I was writing the first evaluation for IZI for example, I sat down and drew a series of diagrams and then I went and talked to Clive and Sthembiso, before I could start writing, because I needed to gauge...so I, I...it's something that's been really on my mind for a while now...how one does that, except in contact."

"Clive, you said you were going to share a few thoughts," prompted Liz.

"Um, I, I knew I wanted to do this in a participatory way, but I didn't have a, a...clear end in mind," I said, "apart from the fact that I wanted it to be practical which, you know, is why I was so keen on the action research component. Um, but I think, like everybody else, um, I've become increasingly aware of this process, um, intersecting with a lot of other stuff that is going on at The Valley Trust. One of the things which I think really...um...came out for me very strongly in our last department reflection day was this idea of multiple *ba*, to use Nonaka's term, you know, this Japanese term '*ba*', which is a space but not necessarily a space...a place in time and space, it incorporates e-mail and personal conversations and...um...places where people come together to engage and communicate. There are a whole lot of those operating at The Valley Trust now, um, we have...probably the biggest one is

the, the All Staff Meeting where everybody is encouraged to get together once every two months for some sort of conversation. Um, and then some people found those, um, more useful than others, but on the whole I think it's been quite good. And then we have, we have the Facilitator Development Programme, and there's three of those. Um, and then we have the various department meetings. And in addition to department meetings there might be learning days. Then there are the Managers' Meetings and the Managers' OD Meetings, um, and maybe there are actually learning groups meeting. Um, and I think that's great. But the concern for me is, and it was really highlighted in that paper by Schein (undated), that where you get these little communities of practice or whatever you want to call them, they evolve their own language which is context-specific. So, you know, at what point do these overlap and at what point is there commonality in the conversations so that learning and knowledge are shared? And I think it's great that all this is going on, but does it have the potential to move *apart* instead of moving closer together? Because this one big one, I don't think...it's not a container for all the others...it's not holding all the others. So that, that is a question...what do we do about that? Um, another question is 'How do we better use what we've got?' like the newsletter, like the website, like the network. And Liz sent quite an interesting e-mail this morning about blogs, which I thought was quite exciting as well. So I think these are all things which we can, which we can look at. At our last meeting, Tuki got quite excited about the newsletter but, ja, we haven't met to really talk about that. Um, and then I think there's another process which is just starting to happen which will help to channel this thinking, um, and it's that we now have a Quality Assurance Committee that looks at reporting. At the moment it's in the very early stages, um, and given deadlines and what have you, all we can probably do at the moment is tidy things up - you know, look at the writing and the style, grammar and what have you. But hopefully, as the idea of evaluative thinking comes in, we'll be able to introduce this idea of working with knowledge into our practice right from the start. So gradually, there's a number of processes coming together which will help us think more clearly about what we do. Um, the *tension*, probably the single biggest tension is - in my eyes - the need for it to be exciting and participatory, you know, where people can get together and say 'Wow, isn't

this great' and get really excited and inspired by the work and the learnings and the knowledge. And on the other end of that tension is the *requirement*, as an organization, to be incredibly good at what we do and to have a high quality of work. And sometimes that has a sort of a - what do you call it? - not a policing function but a, you know, someone at the end has to say 'Well, hang on, can you rethink this?' Because if you think about each one of these *ba*, or conversation spaces - whatever you want to call them - it's fantastic, but what happens if, what happens if you get on the wrong track? And you start talking about your work and reflecting on it, but somehow get the wrong thread. You can get more and more excited and better and better at doing the wrong thing."

"But," asked Claudia, "where does participation stop? Where do you intervene?"

"The way I see it," responded Glen, "it's the vision that draws you, or else it's where you're going to, whatever. It's The Valley Trust vision, and there are only certain things that fit into that vision, and certain things that don't, and that's clear. So then, there are positions, there are people that hold that responsibility and authority by virtue of the fact that we've got an Executive Director, we've got managers. And for me it's very clear that there is that potential system for ensuring that, 'cause you can't go out...I mean, we were talking the other day in the FDP...we were saying if we suddenly had somebody who wanted to do apartheid things here, in the name of The Valley Trust, it's just not on! It's not what the vision says!"

"But," persisted Claudia, "we put in the parking lot 'which are the processes that *don't* enable people to realize their potential?'"

"OK," I said, "in fact, are some of our processes working against us? I've been doing quite a lot of work with our Community Based Health department lately, um, in a number of different forums, or *ba*, and it's been really exciting to see how people's thinking about what they do is shifting. Um, but...that's only happening I think because we're starting to

question what it is that our donors are asking us to do. And a lot of it, for me - and I keep coming back to this and people are going to think I'm obsessed - but it's about how we think of our HIV and AIDS work. And at the moment, most of our funding for that is about messages. Um, what messages do you give when you do VCT⁵⁴ work? What messages do you give at school? What messages do you give as a caregiver? And it's this whole thinking that individuals need to change their behaviour, but we're just not seeing the whole bigger context of, of society which makes it so incredibly difficult for individuals to do anything else. I'm, I'm busy at the moment going through a book called 'Dilemmas of desire' (Tolman, 2002), and if you look at the whole idea of virginity testing, in that documentary we watched, the organizer is saying that if these girls can control themselves, the men will be controlled. But, you know, it's such a patriarchal society in which men have so much power that working with an individual girl or woman with the messages we give, you know, what would she actually do? How do we even expect her to interact or engage or negotiate in a different way? And this book 'Dilemmas of desire' is based on a research programme that was done with teenage girls in America in exploring desire from a teenage female perspective. And the stories these girls tell, you know, of how they actually *shut down* their desire because society does not allow it. The boys, wow!, 'Go for it guys!' and society encourages guys to be macho studs. As soon as a girl expresses some vague indication of desire, she's a slut. So what do girls do? And trying to locate our work within this broader context...I don't think we even *begin* to conceptualize the implications of what we do."

"Coming back to Claudia's comment about the parking lot," said Liz, "it seems to me that this quality process that's now up and running, albeit quite freshly so, might very well address what your concern is. I would hope that it would, because as Glen was saying, we need to align with our guiding statements, and we need someone or *somebody* to, to actually say where the boundaries are, you know, 'This is fine, but in actual fact...'"

⁵⁴ Voluntary Counseling and Testing, an important strategy in combating HIV and AIDS.

"But another thing about that," interjected Glen, "is that it also starts to become a coordinating flow...yes. To me, one of the most important things I've heard is what I heard here today about the conceptualizing, because you cannot be a professional organization...without...that's how you give your unique response! If you can't conceptualize what your problem is, what you're going to do to respond, and what your options are and how to change them, you, you *can't* give a unique response. And you've got to know *why* you do what you do, you've got to be able to draw on documented research - which is theory - and know how to use it in a practical way, coping with the dynamics...but your base thing comes from knowledge, experience, theory, and being able to conceptualize."

"And ultimately make it understandable for all those who are involved," added Liz.

"Make it understandable," agreed Glen, "but purposeful. I think for me that's the most important thing. Because if you just go in and do activities, Liz...you know, this whole concept...you do activities, well why? 'Well, that's what it says somewhere!'"

"I agree with you," said Liz, "but I do think there's the potential now for the organization to engage as a whole..."

"This is why, for me..." joined in Jabu, "I know that there are many *ba*...which sort of link knowledge management and programmes, because you...coming back to the conceptualization, because I think we need to use knowledge gained before to inform us. There are certain programmes which, when I think about I always think about knowledge management and the role of the *CIG* and the role it can play in this...those programmes are the Self Help Groups, and I know that Sthembiso is back from India where they were looking at that bank - what is it called now? *Grameen* - I'm not sure whether, when these were implemented here, they were...but I'm aware that we have tried these projects in this area and some of them didn't go very well and they did more damage than good. Are we now going to repeat what we did here in the Eastern Cape, or Kranskop, or Bulwer, or whatever?"

My knowledge of projects is limited so I'm not sure whether that knowledge has informed the current projects. And for me, that was my understanding of knowledge management and also that was my understanding of this group: that we are going to try to be something that will sort of boost this knowledge, that people will come and get knowledge and conceptualize projects that are in line with our vision and mission..."

"It doesn't stop at conceptualizing," said Glen. "Because that, that is absolutely true, and knowing what was the past experience...but when you were saying we did more damage than good, very often it was...I mean, in my view, very often that sort of damage comes from just doing activities and raising expectations. But I, I think, *I think* the two key things, possibly, are the conceptual stage, but also the understanding of methodology...is the understanding that you can do the same thing in two different ways, and one will stand a *really* good chance of working, but if you do it in another way it won't. And so I think it's this whole concept of the *how*. And that's part of the conceptualization but it is also a separate step."

"I just want to go back to what you said about sharing - it could be work or whatever - but in an exciting way, that people get excited," said Thami. "And while you were busy drawing those circles there, of structures that are available within the organization, um, something came to me about now, I mean like maybe in former discussions, we could be discussing - it could be with a colleague in my department - but it's all about work. And maybe the way we discuss you find that it's so exciting, we get carried away. And um, maybe we were talking about within our little group about simplifying things, and I was saying sometimes it happens that I'm in this group, and maybe you know with language, sometimes there's a barrier, I may not be able to articulate what I want to say so that you can understand it. But if I'm in that other group setting I can be able to say exactly what I want to say. So I'm thinking of the level and um, the language barrier...and you find that in those discussions many important things will come out - it could be questions, concerns, recommendations, you know, things that could help inform what we are doing - but I mean

because it's in an informal setting, no-one is recording but very important stuff is coming out...all those things, you know, get lost. I mean, you do not find them anywhere, and then we continue as usual. And you find that in saying those things, again it's where people are like free, and are confident to say what they cannot say maybe in this group or in those other, um, settings there. So, I don't know, in my mind something is saying if maybe there could be like different circles where people maybe feel confident...free to sort of say what they want to say and then if...things are recorded, I don't know how, but if things are sort of...because sometimes some things can come out raw, and they sort of, now, be refined and constructed to inform, you know, what we do but my feeling is a lot of things are sort of lost there...you know...maybe I'm with Khantsho somewhere, maybe I'm with Glen, *kodwa* the, the, the issue of language is where I feel comfortable to sort of..."

"Thami," responded Glen, "what we've been trying to do in the Open Meeting constantly is find a way to let the groups get together to do that. And I, after the reflection that I've had over the last two, I think the case consult worked better than the first one that had fairly structured reflection questions. But what I have been saying to Clive now for some time...I just feel that we need to use the Open Meeting for conversations...I, I...'cause I know it comes out in conversations, but then how do you get the conversations going when you've made an opportunity? So I *love* that idea of yours, I really do. I think it's great and you know when we were doing the Development Dialogues we also had self-selected groups. But if you get the whole organization trying to do a self selection it tends to get into problems as it has done to some extent when there was confusion with action learning groups, that I still think that those are the ways...When Clive shared that article on dialogue, and I, I went back to look at the *ba*, to me those different *ba*, and what he, they were saying about dialogue...is getting that happening...how...in ways that can use...I think it's wonderful!"

With these thoughts we closed the meeting, as we had committed to go for a walk as part of a newly-introduced "Wellness Programme" at The Valley Trust, but I agreed to write

something for discussion, paying particular attention to the question of *"where to next?"* Again, I was satisfied with the meeting; although there was an element of repetition to each meeting, the issues that kept coming up were being addressed in different ways each time. For example, in the previous meeting, the question of language had been raised, in the sense that knowledge work lends itself to the use of jargon. In this meeting, language was again raised but this time from the perspective of the degree to which colleagues feel comfortable expressing themselves in their second language. And then a question about the purpose of the CIG was again raised: although on the one hand this could have indicated a lack of clarity or direction, I think it was helpful to keep coming back to this question in order to remind ourselves that the group was seeking a purpose; to me this was especially important as I didn't want colleagues to see the CIG as "Clive's group", something that colleagues were doing in order to assist me with my research. It needed a reason to exist other than to support my inquiry, and I therefore viewed in a positive light this iterative approach to clarifying the group's purpose.

And then, although it may not have been explicit, we were starting to address Ramalingam's other questions. We had in this meeting, for example, talked about the various structures which existed at The Valley Trust in the form of *ba*, and although these were not all formal structures, we were touching on Ramalingam's second question: "How does knowledge interface with the existing structure of the organization?". We had also discussed the relationship between knowledge work and programmes, thus starting to engage with the third question: "How do knowledge activities link to the existing core functions of the organization?" And by discussing the importance of aligning to our vision and other guiding statements, and the need for someone *"to actually say where the boundaries are,"* we were starting to address the sixth question: "How does knowledge and learning link to vision, leadership and management?"

In October 2007 I completed my third writing, and in it I attempted to pull together some of the threads that had emerged during my inquiry. I started out writing about knowledge, learning, and complexity, and asked the question which has, in one way, come to provide the "organizational framework" (Bortoft, 1996:57) for my thesis: why do I seem to learn only what I already know? However, I found that early in the writing I started including a reflection on power dynamics, and their role in organizational life. How did I get onto that topic? I asked myself that question in the writing:

How did I get on to power dynamics and leadership when I was writing about knowledge, learning, and complexity? To me, a leader plays a large part in the creation of an organizational culture, and Snowden (2002) emphasizes the importance of culture in knowledge work. I'm convinced that organizational learning requires a certain openness, a supportive space in which it can grow and breathe and flourish - Snowden points out (p. 103) that "learning is more about providing space and time for new meaning to emerge...". Under our previous director there was much talk about monitoring, evaluation, and learning (indeed, it's all there in our guiding statements), but the reality was that real learning was shut down, at least at an organizational level. And here I'm not in any way suggesting that this was deliberate; it was the consequence of a particular way of working that created a culture of busyness not subject to reflection, a sort of "organizational sleepiness" maintained through failing to implement processes for monitoring, evaluation, reflection, or documentation as a conscious part of our practice. Knowledge was viewed as a "thing" to be gathered and captured in databases which would somehow contribute to the achievement of "best practice". [And here I must note that I'm struggling to formulate what I want to say, and that I'm aware of the inadequacy of what I have written, but I recognize the importance of including this dimension of changing organizational culture, and I'll return to it in a future writing...]. (Third writing, October 2007:3-4).

In my third writing I also picked up on the discussion we had started in the CIG about the various *ba* and the processes which they supported, and described these in some detail: the Development Dialogues; the Practice Development Programme; the Facilitator Development Programme; departmental reflections; and the CIG itself. Glen had already noted in a CIG

meeting that all these *ba* had contributed, or were contributing, to change within the organization, and in my writing I tried to summarize this by suggesting that

...all our learnings point towards one thing: the critical importance of deepening our consciousness about what we do and how we do it - as individuals, as departments, as an organization, and as partners with other organizations. This is, of course, expressed in our OD department purpose: to create and hold processes which allow The Valley Trust to become more conscious of itself and its practice. However, when we wrote that, we were perhaps ourselves not fully conscious of the implications. We knew it, but we are now learning it, on a daily basis, in all the processes which we help to create and hold, in a remarkably synchronous manner. (Third writing, October 2007:6-7).

I concluded my third writing by noting that, in my view, the culture of the organization was shifting, and that this provided an opportunity to both deepen and broaden knowledge work within the organization. I further noted that there was a growing consciousness among a "critical mass" of colleagues about what The Valley Trust does and how we do it, but observed that this needed to be nurtured by creating and holding processes that would enable us to use knowledge work as a guiding framework for much of what we do as an organization. I cautioned, however, that

...this opportunity needs to be grasped now, while there is the flexibility and openness to do so. Other factors are rapidly coming into play, which may well influence the direction which the organization takes. Not least amongst these are funding pressures: "survival mode" is not conducive to the sense of freedom required to create space and time for learning (although this may well be the time when learning is most needed). Another factor which may well play a role is the possibility of restructuring in the very near future (indeed, as I write this we are preparing for strategic planning from 20th to 23^d November). At times of restructuring, a sense of uncertainty may prompt staff to leave; this was certainly our experience at the time of our previous leadership change and subsequent restructuring. While it may be true, as Snowden points out (p. 110), that new people joining the organization can contribute to the creation of "chaotic space" out of which new possibilities can arise, I would also argue that times of change and relative insecurity are not necessarily good times

to encourage chaos. I would also argue that as people leave, they take with them their part in holding the organization's stories. This is significant, because, as Snowden notes,

The ability to convey high levels of complexity through story lies in the highly abstract nature of the symbol associations in the observer's mind when he/she hears the story. It triggers ideas, concepts, values and beliefs at an emotional and intellectual level simultaneously. A critical mass of such anecdotal material from a cohesive community can be used to identify and codify simple rules and values that underlie the reality of that organization's culture. (Third writing, October 2007:7).

Indeed, as it turned out, other factors rapidly came into play, and as a result the CIG did not meet again until May 2008. What were those factors which were to influence the future of The Valley Trust so significantly? The critical event turned out to be our strategic planning meeting, held in November 2007...

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Our 2007 strategic planning was significant because it initiated the changes to our organizational structure which had long been required for The Valley Trust to become a more integrated organization (Lievegoed, 1973). I have already described in this thesis the various change processes with which the organization had engaged since 2001, but what I haven't mentioned was that these processes could not be completed because the work of the organization was still split over eight departments. For several years we had debated the necessity of integrating our work, but had not acted on these debates. However, by November 2007 our Board of Trustees was becoming increasingly concerned about The Valley Trust's financial situation, and was also asking questions about our programmes. This is not the place to describe these questions, but simply to say that the course of action which the Board took (with the support of most staff members), was to put in place a new structure, consisting of three divisions each headed by a Senior Manager accountable to the Executive Director. The three divisions were to be Programmes (which would pull together in one organizational home all The Valley Trust's interventions); Organizational

Support (which would include finance, human resources, and the conference centre); and Monitoring, Evaluation and Research (which I understood to be a breakthrough in the sense that the importance of these functions was at last granted structural recognition).

Together, the Executive Director and the three Senior Managers were to form a Leadership Team responsible for the organization at a strategic level. Tuki was asked to convene a transition team to guide the organization through the difficult period of building a new structure which would come into effect on 1st April 2008. He asked Khantsho and me to join him on this transition team, and tasked Liz with keeping the organization on track while we devoted much of our time to the details of the transition.

Why did the Board finally decide to implement a new structure? I can't say for sure, but in my fourth writing of February 2008, I speculated as follows:

The Valley Trust is embarking upon a new stage of its evolution as an NGO. A shift in paradigm occurred at our strategic planning in November last year, when it was agreed that we need a new structure to take us into the future. As in most paradigm shifts, nothing much changed in terms of the reality confronting our Board of Trustees and our management. However, the way in which this reality was perceived changed. I have noted elsewhere that, during the CHESP module facilitated by Richard Bawden, he remarked that three things are required for a paradigm shift to occur: knowledge of one's own paradigm; knowledge about other possible paradigms; and a shock big enough to make one want to change. In the case of The Valley Trust's Board, I think that the dwindling income over the past year has provided the "shock". This has created the opportunity for everyone in the organization to take seriously what we have been saying for some years (but not putting into action - not learning?): that we need to see our work differently and change our approach.
(Fourth writing, February 2008:2).

On the whole, most staff saw these changes in a positive light. What was perhaps unsettling (certainly for me), was the fact that the three Senior Manager positions were to be advertized; I had hoped (expected?) that these would be filled through promotions based on experience. And what we did not foresee was the turmoil and pain which was to

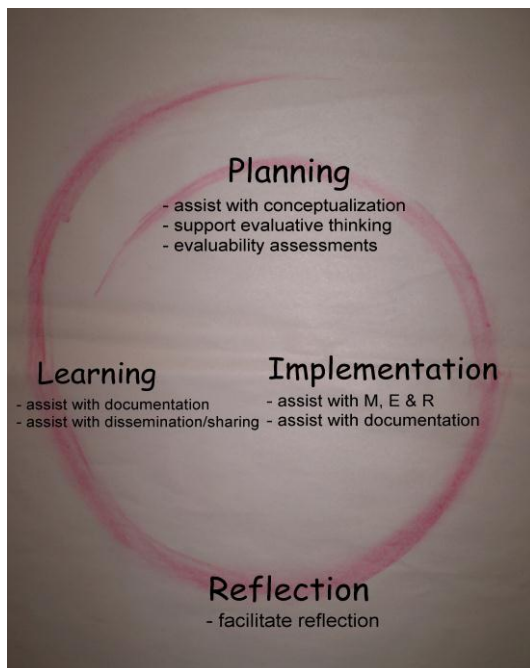
come as a result of the limited (but probably inevitable) retrenchments which followed the restructuring.

Again, this is not the place to describe in detail the transition process, except to say that it took many hours of dedicated meetings, discussions, and consultations. In spite of this, some colleagues felt that the consultations were inadequate, but as a member of the transition team I believe that the process, although no doubt far from perfect, was a fair one. During this time of transition, the three Senior Management posts were advertized internally, and I applied for, and was appointed to, the post of Senior Manager: Monitoring, Evaluation and Research, which I saw as providing me with an excellent opportunity to implement (or better, to co-implement within the context of a more integrated organization), the learnings which had emerged thus far from my/our inquiry process. However, one aspect of our appointment which we had not foreseen was that all three Senior Management appointments were subject to a six month probationary period. As a result, the first six months of our appointment were stressful beyond the expected difficulties of guiding three new divisions into being. But again, I'm getting ahead of myself.

Part 4

Much of the first six months with the new structure was dedicated to getting a feel for its implications, and especially for the new Programmes Division to find its feet. The new Monitoring, Evaluation and Research (M, E & R) Division was made up of nine members of staff (including myself), all with different and complementary experience relating to our organizational purpose which, in our 2008/2009 annual plans, we described as *to assist The Valley Trust to learn about itself and its practice, so that it becomes a more effective NPO which creates and shares knowledge so as to contribute more broadly to the health and development of individuals and communities*. Also in our annual plans, we included the diagram on page 125, to illustrate what we believed to be our major contributions

presented within the context of the action learning process. We also noted that *"It must be emphasized that the M, E & R Division, along with the other two Divisions (Programmes, and Organizational Support), is still finding its feet. The restructuring process has been arduous, and although it has now been completed, there are still details to attend to... The M, E & R Division has attempted to support the exploration process in the Programmes Division as far as possible, but more work remains to be done. For example, it has not been possible to establish in detail the support which Programmes requires from M, E & R.*



The proposed role of the Monitoring, Evaluation and Research Division, superimposed on the action learning cycle.

I should emphasize at this point that at no time did I see the work of restructuring and nurturing a "new" organization as separate from my inquiry; indeed, I saw it as an integral part of my inquiry. So while the events and processes (which I have here only been able to touch on) were unfolding, I was keen that the work of the CIG should continue and was determined to continue documenting my inquiry in the form of reflective writings.

Indeed, I shared my fifth writing in April 2008, and in it I quoted from an e-mail which I had received from Claudia in response to my expressed concerns about the CIG's lack of engagement with my writings:

I think the reason for not receiving many contributions to the second and third writings may be related to my perception (and maybe that shared by others) that these writings were less focused on TVT but rather addressed more of your own thinking and perceptions. Also, if I remember correctly, the first writing was more 'intimately challenging intra-organizationally' which is probably why many CIG members felt more compelled to respond in some way or another ('study with a case' as opposed to 'study without a case.')

I responded to Claudia, in my fifth writing, by noting that

The more I engage with questions about "knowledge work", the more I realize that the parts which really interest me are what I can only call the "human dimensions", as well as the environment or organizational context within which the human dimensions⁵⁵ unfold. In saying this, I'm not for a moment wanting to suggest that the human dimensions are separate from the organizational or the technical. But what fascinates me are the choices that people make about knowledge, especially when it comes to deciding on whether to accept or reject something, what "meaning" to make of it, and whether or not to act upon it. (Fifth writing, 25th February 2008:2).

Most of what followed in this fifth writing was then an elaboration of what I understood to be the importance of writing, and especially of writing in ways that might be more appropriate to documenting *process*, which is what I perceived the core work of our organization to be: working with developmental processes. But it wasn't until May that we managed to meet again as the Cooperative Inquiry Group...

The eighth CIG meeting, 22nd May 2008.

After a gap of almost eight months, the members of the CIG met again, against the background of a restructuring organization, and started by reconnecting to the process using Ramalingam's guiding questions.

"Do you think, in fact, we *do* have a better understanding of how knowledge and learning is understood and applied in the organization?" I asked.

"Well," said Glen, "maybe more *awareness*."

⁵⁵ Liz noted in her response to my fourth writing that *"It seems to me that the relationships that have developed over time are emerging as the foundation for the way forward."*

"I think there's different perspectives, too," said Liz. "I find in exchanges with colleagues who are not part of this group, their understanding of knowledge management is very different, um, than what we've been talking about here...there's different perspectives, um, so...but I think it's different in different places."

"I really don't think there's a 'one size fits all' definition," I said. "You know, it's, it's so hugely contextual, and what might work in one situation is going to be totally different in another situation. But I think what is important is what Glen is saying, you know, the consciousness of that 'What am I working with in this situation? How do I know what I know? What do I think I know? What am I going to do with it?'"

"Or, or even if it's not quite as far as that," said Glen, with some hesitation. "But no, just the consciousness, is that it's needed, it really is needed and it really does help, um..."

"What is 'it'?" asked Claudia.

"Learning from what you're doing," responded Glen, "and thinking about it, and I think that there's a...I mean, I think that there's a growing understanding in fact...I just think that what's happened in Programmes at the end of April...*really* shook people up because for the first time...I mean, they'd always just done activities...well, not everybody, but there'd been a general tendency as Davine always says, to a bias for action, you just do *action*, but without knowing why, or how, or how to go...to plan, and that that's about knowledge creation, the whole thing. And we talk about conceptualization, um, and integrating theory and experience, and applying it to a particular situation and there's a particular process. And I think that *that*, people...I mean they don't...people are not yet having a sophisticated understanding of it, but I think the *awareness* is growing. And people are *not* balking against monitoring and evaluation....I think it's becoming an accepted...it has to be...we don't maybe know what to do with it or how to *do* it, and it's not...I think there's a *demystification* happening, which to me is probably the most positive thing of all. It isn't

that we've got to bring in an expert, but I think there's a...*beginning* of understanding, that you *cannot*, in fact...in practice...you yourself, not engage with knowledge and learning."

"The way we impart knowledge or share our knowledge often reflects on how we are actually understanding ourselves," said our colleague, "but at the same time, um, it's important that we learn better ways on how to impart that knowledge because sometimes the frustrating thing is that you *do* understand quite a bit of it, but you don't impart it very well, you don't express yourself very well. And there's frustration often because you have the understanding but you don't know how to express it...that's one thing. Another thing is sometimes you are able to express it, but you don't have a very good understanding so you don't express it very well. And, um...but often people are sort of judged by their knowledge, by the way they impart it, and, um, that can be quite tricky at times. To me a concern is how we impart this knowledge and take it further so other people can share with us, and it's always been a challenge for me, and sometimes I think it's because I don't understand enough or sometimes because I'm not expressing it well enough."⁵⁶

"Just an anxiety," said Liz, "but for me, these last few months have been quite...quite traumatic, and one of the things that is causing anxiety and...it is expressed outside of this group as well, and it supports what we talked about last year, that knowledge exists in people...we've had quite a lot of people go away, and how much of our knowledge has gone with...Sthembiso and Emma and a whole lot of other people, how much has gone?"

"For me," said Jabu, "I sort of like jump, you know, in that pyramid, that knowledge pyramid...what do you call it?...my focus is at the lowest level and then for some reason I will jump to, to wisdom because I had come to the consciousness of the fact that you, you

⁵⁶ As I listen again to this transcript, it strikes me that during the meetings of the CIG an observation would not infrequently be made that wasn't followed up at the time, or didn't seem particularly important, but that would later assume significance. In this instance, our colleague was raising a matter that I would later give a lot of thought to: how do we, as an NGO, share our knowledge in our own voice? It is a question that has become highly relevant to the upper loop of the lemniscate. I will come back to this aspect of the CIG at the end of this chapter.

cannot impart wisdom. Wisdom comes with, with age. You can have all the data, you can analyze it and turn it into information and knowledge but...this, this softness about wisdom...and I, I actually have been frustrated at just looking at the organization and, and realizing that we don't have that kind of wisdom. And the fact that you can have all the knowledge, wherever, people can access it, maybe have a way of how they express whatever...which is why for me I was very pleased at what happened at the Programmes Division process, because for me it sort of like confirmed that, you know, we are moving up the knowledge pyramid. And as Glen was saying, there is a consciousness about how we can learn from our work but I think there are...we need to fine-tune, or maybe just make the processes clear, because else you find that although people do understand, somehow there is an obstacle...they can't go forward...I'm not sure whether it's accessing this knowledge or it's the way it is packaged or maybe just simple procedures on how to access it..."

"Can I ask, Jabu," said Glen, "um, what part of what happened at the Programme's planning are you referring to? I mean, quite a lot happened there..."

"The issues that were raised," responded Jabu, "and the fact that people raised those issues, because sometimes you, you have an issue to raise and you don't have the platform to raise it, so whatever platform comes...you just go ahead and make it anyway."

"Ja," I said, "I think for me...I tried to include this in that report to Ford⁵⁷...um, I think we've actually progressed some way within our projects and programmes, you know, I think there is that growing consciousness, that, that gradual *opening out* to monitoring and evaluation and learning, you know, that it's not a *judgment*, that, you know, we really are looking at the process here. But at the same time it's still not, you know, we're still not sharing that necessarily across projects or across Divisions. But I think where I've really found myself fortunate is serving on that Quality Assurance Committee. I mean sometimes it's a *huge* amount of work, but you get all this...all these reports coming to you which

⁵⁷ The Ford Foundation funded The Valley Trust's knowledge work initiative for several years.

otherwise maybe you wouldn't look at. And you get glimpses into what's happening in the organization. And sometimes, you know, those glimpses are already filtered through other people's eyes or they're a little small part of, um, of the whole project. But nevertheless you start to make the connections. So although that is more of an organizational thing and it's happening with three people, and it's still not *nearly* good enough...you know, how do we share that more widely? It's fascinating stuff!"

After a bit more conversation about specific aspects of the planning process in the Programmes Division, I tried to bring us back to a broader organizational view: "So where do you think we might take this now?" I asked. "We've been through, or we're nearly through, this transformation process in which I think we've tried to recognize the importance of working with knowledge in whatever form, and that's partly reflected in this new structure, um, and we've spent quite a bit of time looking at knowledge and learning and how we understand that. And I guess we can go on doing that and keep on refining it and discovering new things about it. But does anybody have any ideas where we can, where we can take this work now so that it becomes a lot more embedded...located within our practice? We have this whole Programmes Division which is really at the heart of our organization, and we're hearing from Glen about how people are starting to understand a lot more deeply what it is that we're doing and how we're doing it...perhaps raising questions that we can use to build our own action research agenda, whatever. Um, how do we continually pull all this closer together, um, and try to avoid us still having a Programmes Division which works separately from Organizational Support and, ja..."

"Are we going to actually try to do something in this group?" asked Glen. "I think that's how I understood you were asking it."

"Well yes," I replied. "I think, I think this group...we need to look at it and say 'Well, OK, do we maintain it? Do we open it up to new membership? Do we shut it down?' But somewhere there needs to be a group, I think, that works across Divisions and pulls things

together. And I'm just wondering...you know...we talk a lot about Home Week...if we don't need to rethink Home Week. And it seems to me there's two opportunities in Home Week: there's the Thursday morning which we used to call Managers' OD, which I think is now going to become, I don't know, defunct in one way or another, or we need to change the nature of that...um, or there's All Staff meetings. Um, and I think for me there's a danger of All Staff meetings just becoming the routine housekeeping thing again. And I'm just wondering if we shouldn't go back to that idea of setting aside a bit of time for the housekeeping issues which need to be dealt with, but then this group coordinating All Staff meetings in future where each month we ask somebody to prepare a sort of a 'starter', as in the form of a presentation or a story or a, you know, maybe sharing that, um, DVD on people's stories...something to share the context, to share the unique situation. And then home in on some questions or some challenges and invite people to engage in small groups or...whatever's appropriate. So at the end of that period, we, we've shared something of what we're doing, we've had the opportunity for people to, to engage more deeply in small groups, *and* we might have surfaced challenges or research questions or focus areas or something so that those All Staff meetings actually become practice-based."

"What I like about it," said Liz, "is that there's a lot of exciting stuff happening in Programmes that we who are supporting need to be part of...if we did it that way it would open it up to the whole organization."

"And it then truly can be the channel for becoming organizational learning," agreed Glen. "I mean...I, I just *really* would love to see that."

"Perhaps we should do both," said Liz. "The Thursday morning and then the..."

"We have those times," I said. "I don't know how best we use them. People seemed to be so pushed for time at the moment...I'm *really* not wanting to overload..."

"We've called ourselves a cooperative inquiry...that means we're trying to learn something," said Glen. "And maybe that...from the All Staff meetings...that's where this group and anybody else who wanted to be part of it - because it never was closed as I understand it - does the...pulls the threads together...that's the inquiry and maybe we...for this group...maybe we...things we want to inquire about in that process. I mean I totally agree that that's the way to go. And in fact it's also very...it resonates with some of the thinking that Khantsho and I have been doing around the sharing within the programmes anyway, and how...because they were just...the teams were just so *excited* about working together that it was something we were planning to maintain."

"So when we meet we would plan *forward* a month, and reflect *back* a month," I said, trying to clarify how the group would coordinate the All Staff meetings. What a wonderful idea of working with time! I'm, I'm very happy with that as a, sort of, finishing point. So tomorrow we have an All Staff meeting but I think it's a fairly short one to deal with some housekeeping stuff. So, that means that...can we squeeze in an extra meeting early in June to plan for June, and then get the rhythm...or otherwise I'm happy just to work with whoever is willing to plan for June if we can't make another meeting."

"What sort of planning would we need to get started?" asked Glen. "Get an idea of where to start, and we could just..."

"There's stuff which has been fascinating," I said, "and I've been talking to colleagues about, um, the conversations about sexuality that we had last year were very, very interesting and they need to go somewhere, so that's one thing we could do. And if you read what's coming out in the literature at the moment...I've been sharing a little bit of it...um, so what does it mean for our prevention messages, and what are those messages, and how do we decide on those messages? Um, but then the other thing is the work with men...I mean, what Nhlanhla has been doing there is *fascinating* stuff, and it has the potential to

become a really hot conversation! A really lively conversation. I mean, those are just two ideas."

"Well," said Glen, "are they not fairly linked? Which would you suggest we start with? A practical one or a conceptual one?"

"I think it needs to be as grounded as possible," I responded.

"Then why don't we ask for that men's group for our..." suggested Glen. "And then the sexuality one might grow out of...'cause we need...in order to learn...we're not always going to be talking about what we do...so maybe it becomes almost a two-month theme, so that the first one is presentations, stories, whatever..."

"Well, if everyone's happy I'll pick it up with Nhlanhla," I volunteered. "And we'll meet again on Thursday 26th June, with the All Staff meeting the next day?"

So with that agreed, the meeting ended with all of us, I think, looking forward to taking the process into the organization as a whole.

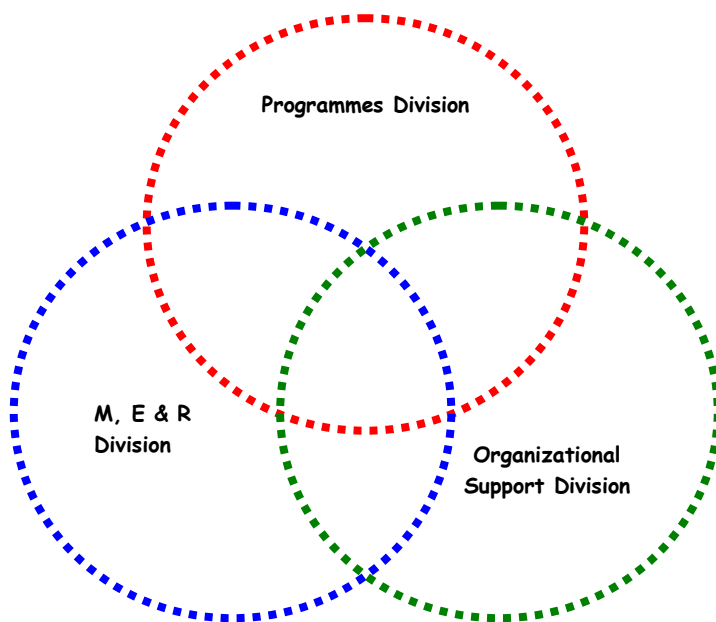
The ninth CIG meeting, 26th June 2008.

By the time we met for the ninth CIG meeting we were three months into the new structure, and still very much finding our feet. In spite of the pressures of work, five members of the group made it to the meeting: Tuki, Glen, Claudia, Liz and me. In addition, we were joined by an American student, Jeanne, who was spending three months at The Valley Trust to complete her undergraduate research project.

At the start of the meeting I noted that we had spent a lot of the previous year looking at how we understand learning and knowledge in the organization, and had moved on to explore

how learning and knowledge creation interfaced with the existing structures and core functions, in the process trying to make our inquiry a lot more grounded and more practical. I also reported that I had met with Nhlanhla, to put to him the request which arose during the eighth CIG meeting, that he present something on his work with men at the next All Staff meeting, which he had agreed to do. I then suggested that we move on to see if we could surface any learnings which had emerged over the past three months of the organization's change process.

"For me," said Glen, "one of the most important discoveries was that when we were drawing



The Valley Trust's diagram to show the integration of its three Divisions.

the structure (refer to the diagram, left) it was obviously a very cerebral activity, 'cause one had to try to think that we want to move to social development, and we know that some programmes are further than others, but we also know that some are not as far, and some of them, um, have certain aspects that are not directly aligned to the vision, so we need to have two silos or structures⁵⁸. But in fact, in this week of 21st to 25th April, we realized that to do that would be to

block progress at The Valley Trust, because there are so many similarities in terms of themes and in terms of goals that, that it really would have been obstructive, *destructive*, to have kept them separate. And, um, and therefore I think that out of that is that one of

⁵⁸ At this point in the restructuring process, the Programmes Division was divided into two sections, with the intention of appointing a manager to head each section. It was later realized that the work was moving to a degree of integration that made two sections not only unnecessary, but counterproductive.

the major learnings is the new concept of the structure that Khantsho presented at the Board meeting. And then the other thing is I think largely it's not planning that we've been doing, on its own, and it's not capacity development, it's capacity...it's working...it's doing what we do in such a way that it is an enabling process and that whatever we do is an opportunity for capacity development. And that it's not an add-on thing at all...I mean we've known that for a long time, but it's actually *seeing* it happen so that everything's an opportunity for capacity development."

"Can I ask a question?" said Tuki. "I mean this has happened over a series of days. Now is it possible to, sort of, comment on the first time this happened. I know that there was a lot of anxiety...we, we went into a restructuring process, there was anxiety when we took that decision. Then when we started implementing there was a lot of anxiety almost to a point of resistance. Then we went ahead with the planning and while we assume that at that stage there was still anxiety, I know that the first day when we said Clive's division will sit together...your division, other division...there was still uncertainty. And then...can someone comment as to how they have seen people changing as they move along in those meetings? But also on the ground, are we seeing people now, eh, possibly doing things different, asking questions differently as a result of one meeting...going back into the field and then coming back into the meeting...or any discussion...in other words, can we say what is emerging during those discussions is beginning to translate into actions on the ground?"

"Well," responded Glen, "from my observation, my first statement is that this process has enabled us to do things that we've been wanting to do for many years. It has *really* enabled us to do so. But the second thing I think that I would like to say, Tuki, is that my understanding of the 'anxieties' I was seeing was not about the restructuring. My understanding, both as a staff rep and in my capacity as a facilitator in The Valley Trust, my understanding of that anxiety was that 'Oh gosh, we're going to lose our job' and initially, and I'm talking about November last year, some people who I...whose jobs were...whose projects were coming to an end or who were feeling almost spare-partish -

there wasn't a manager or whatever - were those who were most stressed. Whereas once we started the restructuring...I mean I think the majority of the staff...I mean they felt that they participated because we had all those things on the walls, after the Board had given them *their* thing and it was very clear that - I'm talking mainly I think of the facilitator staff - and they were very positive about it...there wasn't the anxiety there at all about the actual restructuring, and many of them were actually feeling as I've just said...'Well we've been wanting the opportunity to get rid of departments for a long time etc'. So those are the sort of overview things. I think there's a growing confidence, so that people who've been quiet...in fact one was just so ecstatic during a presentation and said 'Look at me, I'm standing talking to you! I'd never have done this before. And you're all listening!' So that growing confidence, and because of that a growing capacity, because with the confidence your capacity increases. And, um, a *great* appreciation about hearing what other people are doing, and an, and an excitement and an Aha! to say we're calling ourselves different things but we're not really different, we are working on the same things. And those themes that Khantsho was able to extrapolate came from that, and the staff have had that realization by themselves, and it was obviously part of the reflections there. So I think that that has helped."

"Can I ask, Glen," I interrupted, "in terms of the planning that Programmes have been doing, um, has there been an incorporation of learnings from the field, from the Facilitator Development Programme, from Practice Development...it might not even have been conscious, it might just have been a *smooth process* that it was brought in automatically?"

"Clive, I think that the disadvantage has been the fact that we have had to move so fast," answered Glen. "Um, because there are deadlines, we *have* to have budgets, we *have* to present to the Board, we had to get to certain stages. And if we had gone through the process in a *truly* developmental way we would have probably done something like IT⁵⁹ did

⁵⁹ The Integrated Technology Department had moved to a team structure some time before the organizational restructuring, and Glen is referring here to the process which they used to implement the change.

when they moved to teams - they withdrew from the field for six months. So it hasn't been an ideal process, but you know, for change to happen it doesn't have to be an ideal process. It happens. And I think what both Khantsho and I have been thinking about is, is obviously growing...what's happened. But the people who were in the FDP have continued to say that they see it coming alive. It hasn't been a specific thing...they, *they've* seen it and *they* kept saying 'Well of course now, you know brought the FDP on, you couldn't *not* go into this process', you know, almost 'Why did you take so long to *get* to it?' They were bringing that together and the confidence and the other thing is, is *amazingly* enhanced communication and strengthened relationships in the programme teams...across teams, and in the teams. An identity growing in the teams, but...also across..."

"Is it too early to, to ask," said Tuki, "if, in the documentation that we get, particularly at the reporting level, whether we are beginning to see some indication of reflection? One of the issues we always complained about was, when we read reports, we always say 'mechanical reporting' where you could almost...in fact there were times when you could even link one report to another, or it was purely 'I'll report on this whether it makes sense or not', which may not have been conscious but from where we were sitting it sounded like the report is written maybe in two hours because it is due."

"Well," I said, jumping in, "I can comment on the ones that I've seen, but I'd like to ask Claudia...in the writing of that HIV and AIDS M & E report, um, how much of that was generated through some sort of self-reflection process of colleagues actually doing the work? I think that one of the things that you said that really struck me was that although there were a couple of pages of recommendations, a lot of those are already in process, you know, so people have been sort of action learning from their experience in the field and those improvements have already been initiated even though they appear in the report as something for the future."

"Absolutely," said Glen "by raising the consciousness, it starts to happen. In some of Khantsho's and my reflections, one of the things that we have said - and maybe that's a learning too, Clive - from this process is that we've started to identify people's different talents and strengths which we would then work into how we, how we work with them and what we support. The other thing that's happened as a result of that: we've got some of the young facilitators supporting each other, based upon their strengths, so that they're taking on more responsibilities, and they are mentoring each other."

I found this exploration of organizational change and capacity building encouraging, but then the conversation took a very different turn: it quickly drifted into a discussion of the challenges to adequately documenting our work, and the need to incorporate more non-linguistic methods such as photography. Although I was somewhat surprised by the change in direction and struggled to hold the process, I found this discussion very interesting, as I had recently become fascinated by Chia's (2003) article, in which he argues (p. 953) that traditionally (at least in the West), an *"alphabetic-literate culture"* privileges written knowledge as *"the only reliable basis for effective action."* However, in other cultures such as East Asian, knowing takes a form unmediated by writing, a *"relentless perfecting of action."* This seemed to me to resonate with my emerging understanding of learning and knowledge creation at The Valley Trust: it was not that staff were insensitive or unresponsive to organizational requirements for more conscious learning, but rather that this learning takes multiple forms within the organization, with some staff more comfortable with the written form and others favouring the non-written, learning-in-action form. The anecdotal evidence which was surfacing in the CIG conversations indicated that change *was* happening, but in a way which tended to reflect Zeleny's (1996) view that *"Knowledge is purposeful coordination of action"*. I realize that this brief description of my learning about how *colleagues* might be learning could be viewed as simplistic. The literature on learning, knowing, and knowledge is voluminous, and I will come back to this in the next chapter. But for now I am simply attempting to share something of the

excitement of an Aha! which emerged from the intersection of my reading and a CIG conversation. I also followed this line of thought in the conclusion to my sixth writing:

I am becoming increasingly aware that my own inclination (given, no doubt, my roots in an alphabetic-literate culture and education) is towards the "western preoccupation" with documentation and reflection as a pathway to knowing. But what if the organizational culture, in which I am only one participant, is largely not so inclined? I have frequently expressed the need for us to explore other forms of documentation and representation, but most of them still require some form of reflection and (for want of a better word) "capture". What if the organizational inclination is not towards documentation, but towards "learning/knowing-in-action"? This would certainly not preclude our learning for improved effectiveness (indeed, it may be enhanced), but it might pose challenges for the upper loop of the lemniscate: the sharing of our learnings with others. It could be argued that engaging in dialogue processes could share our learnings, and also allow us to learn from others. But something in me craves the documented story, the image, some artefact that I can come back to again and again, even though I know that what is represented in that document or image is knowledge in a very temporary state. However, the transitory nature of knowledge doesn't make a painting by Cezanne, or a musical score by Mozart, or a piece of writing by Goethe, any less real and relevant to me - indeed, I subscribe to the view that meaning is created (or perhaps better, re-created) each time there is a fresh interaction between painting and viewer, or text and reader, or music and listener. But that's me, and this research is located within a participatory paradigm, so where do I take this challenge from here...? (Sixth writing, August 2008:13-14).

I will come back to these musings in a later chapter, but let me now move on to the All Staff meeting, for which I had asked my colleague Nhlanhla Vezi to present on his work with men as a way of stimulating a conversation at organizational level...

The All Staff meeting, 27th June 2008.

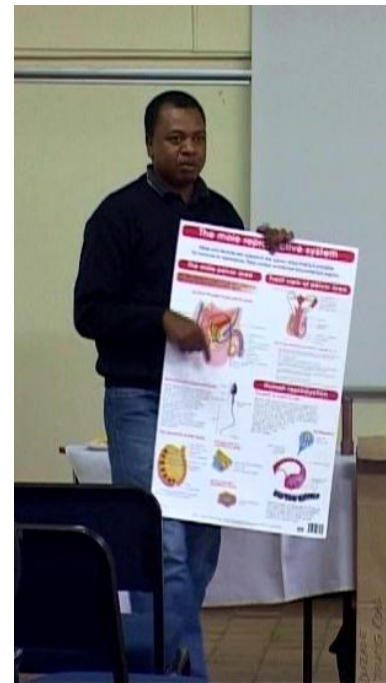
I had viewed a presentation by Nhlanhla as offering a promising start to a series of organizational conversations. I had had several conversations with him about his work with men, and had interviewed him in February 2008 in preparation for writing a report to a

donor. I was aware that he took an innovative approach to working with men, using language which relaxed participants and often addressed "taboo" subjects in his conversations.

At the All Staff meeting I introduced the topic by pointing out that it is sometimes difficult for us to understand the complexity of our work, given that so much is happening, and that we hoped to use the All Staff meetings to share more about our work. Nhlanhla then presented on his work, illustrating some aspects by using the same anatomical charts which he used in conversations; he also invited colleagues to participate and ask questions. (In the electronic version, click on the folder labeled "All Staff meeting" to view a video of the presentation, filmed by Simphiwe Mthiyane,).



Clive Bruzas and Nhlanhla Vezi at the All Staff meeting, 27th June 2008.
(Photograph: Simphiwe Mthiyane)



Nhlanhla Vezi presenting at the All Staff meeting, 27th June 2008.
(Photograph: Simphiwe Mthiyane)

I enjoyed the meeting and thought that it went well, and laid the groundwork for future presentations. I decided to invite colleagues to provide feedback to help the CIG reflect

on the event, and so sent out an e-mail to all colleagues asking for their comments. But only Claudia responded.

The tenth CIG meeting, 25th August 2008.

As it turned out, this was the penultimate meeting of the CIG, attended only by Liz and myself. I expressed my concern that, as a group, the CIG had undertaken to coordinate the All Staff meetings and the next one was due the following week. However, it seemed inappropriate for Liz and me to plan the next All Staff meeting on our own, so I suggested that it be left up to the Leadership Team to coordinate the event at their next meeting. After that we talked for 15 minutes about some of the challenges facing the organization, especially in terms of documentation, and I raised the need to approach the proposed changes to the organization's network with care, as I saw it as an important (albeit as yet unexplored) aspect of knowledge work at The Valley Trust. We also noted that network design and functioning related to Ramalingam's fifth question: *How do connective physical and electronic infrastructures support knowledge and learning strategies?*

But it was an unsatisfying meeting, and now that I look back on it, it was probably an early indication that the work of the CIG needed to move in a different direction.



This third chapter is a long one, but in it I have attempted to share something of the excitement of working with a group of colleagues to inquire into a topic of common interest. In my representation of the CIG conversations, I have deliberately included the pauses (...), the "ums" and "jas", and the hesitations, firstly to share with my readers the often tentative, searching nature of the conversations, and secondly to present something of the cooperative inquiry *as it unfolded*, without imposing my own interpretations too early in the story. I realize that some of the conversations may seem repetitive, but as Wenger (1998:52-53) notes,

We may know our colleagues very well, and yet we repeatedly engage in conversations. All that we do and say may refer to what has been done and said in the past, and yet we produce again a new situation, an impression, an experience: we produce meanings that extend, redirect, dismiss, reinterpret, modify or confirm - in a word, negotiate anew - the histories of meanings of which they are a part.

And conversations are, as Isaacs (1999) observes, the way in which people think together; indeed, Shaw (2002:51) suggests that

People in conversation are shaping and shifting the web of enabling-constraints in which they are enmeshed. They are constructing their future not as a single 'vision' or a set of goals, but in terms of what courses of action become possible and sensible for them in their evolving circumstances as they communicate.

In quoting the passage from Shaw, I am not for a moment claiming that the conversations of the CIG led to profound organizational change at the time they were held; it would be naïve to imagine that change happens in so simplistic and linear a manner. However, I do believe - based on the evidence that emerged during the CIG meetings - that the conversations contributed to the way in which members of the CIG were attempting to make sense of the organization at the time, and indeed continue to do so. I also believe that the conversations may have flowed out into the organization, again not in any intentional, directed manner, but organically, as one conversation fed into another.

As I write this I realize how much the CIG conversations contributed to my own understanding of knowledge processes at The Valley Trust, and I see how the life of the CIG formed for me the backdrop to a period of truly remarkable interweavings of conversation, reflection, reading and writing. A few lines from Pusey (1987) quoted by Dixon and Sindall (1994:307) summarize the feelings of - what? deep satisfaction? - that I experience when I think of the CIG:

Every situation involves a 'horizon' - my horizon is the encircling limit of my understanding. Just as I have my own horizon, so also does a community, a culture, and a tradition have its

own encircling horizon of meanings. The methodologically important point is that I only understand the community, culture or tradition in the 'moment' of doubt, dialogue and question, that arises as my horizon meets the horizons that encircle the object of interpretation, be it a person, a culture, a text.

☪☪☪

And so the time has come to (almost) leave the CIG and move on, although I will refer back to it in the next chapter as one of the foundations on which I built The Valley Trust's knowledge work strategy. But before moving on, I would like to return to the observation which I made in footnote 56 on page 128: that the CIG not infrequently touched on issues which we didn't follow up at the time, but which were later to assume significance. Here, for example, I think of Glen's observations (p. 136) about the challenges to knowledge work that were introduced by organizational deadlines; by the importance which the group attached to the *action* component of knowledge work by frequently coming back to questions about what the CIG was actually trying to *do*; and even the comment from our colleague (p. 66) that "*...you can only ask questions about what you know already,*" which seems to me to paraphrase my realization that "*I can only learn what I already know.*" Glen also highlighted the issues of honesty and transparency in the organization in her response to my first writing (pp. 238 and 239). There was so much experience and insight carried by the members of the CIG related to knowledge work, although this had not been brought together in any systematic way at organizational level. So at the time of the tenth CIG meeting I had certainly not anticipated the demise of the group and indeed, was hoping that we could continue and indeed broaden the work of the group to include more colleagues. We were to hold one more meeting, but before that final meeting something happened which forced me to question everything I thought I knew about my relationship to the organization for which I had worked for nearly 25 years, and precipitated a sudden change of context which pushed me to see the action dimension of my research in a different light...

Chapter 4: The Road



"The crossroad"

Charcoal drawing. Clive Bruzas, 26th October 2008

On Friday 24th October 2008, I was informed that The Valley Trust's Board of Trustees had not confirmed my appointment as a Senior Manager, but had rather decided to extend my probation by another six months.

At the time I found it almost impossible to put into words the mixture of anger, shame and bewilderment I felt at having my probation extended - and at being the only Senior Manager whose appointment was not confirmed. Admittedly, there were aspects of my job description that I hadn't adequately managed to address, but six months was a relatively short period in an organization still in transition, and in my view I had made significant progress in many areas. My immediate response was to make representation in writing to the Board to reconsider their decision, but the opportunity to present my case at a Board meeting didn't arise until 18th November when, as there were too few Trustees present to

form a quorum, a decision about my situation was held over until the next meeting of the Board - in February 2009.⁶⁰

I said that I struggled to put my feelings into words, but I did put them into a drawing - the one which introduces this chapter - a rather grainy, bleak charcoal sketch of a crossroads. I felt myself to be standing at a crossroads in my life: should I resign and seek a more enabling environment elsewhere? Should I stay and strive to convince the Board by my actions that I was indeed the right person for the job? Should I resign myself to the fact that knowledge work at The Valley Trust would probably always be a struggle, as by all reports it seems to be everywhere? Would it be best to simply work with whatever situation I found myself in and respond as appropriately as I could? As I grappled with these questions, I came to realize that there was no one "right" answer, and that although I felt apprehensive, the situation I found myself in held certain possibilities. The questions I was asking myself were important questions; as Block (2009:106) points out, there are three qualities to a great question: *"It is ambiguous...it is personal...it evokes anxiety"*. I didn't have a clear answer; I felt that my situation was highly personal (although with strong organizational implications), and I certainly felt anxious. But I also started to feel that the situation opened up fresh possibilities for my research, and I noted in my seventh writing that

Far from being humiliating, this event...has provided me with a way into my thesis - after all, this is meant to be an autoethnography, and if, as Patton (2002:84) says, the foundational question of autoethnography is "How does my own experience of this culture connect with and offer insights about this culture, situation, event, and/or way of life?", then I can use this experience as a window onto the organizational culture relating to knowledge. And the truth is, I'm probably going to have to struggle every step of the way. But how I choose to do that is critical...(Seventh writing, November 2008:3-4).

⁶⁰ In this chapter I will refer to my efforts to have my appointment as Senior Manager confirmed. In so doing, I have no intention to offer comment on the decisions of the Board or to attempt to justify my performance. I simply report on events as I experienced them because of the powerful influence which they had on the way in which I proceeded with my work and research. As Tsoukas and Hatch (2001:998) point out, *"What happens in a narrative, happens situationally (or situatedly). Providing or invoking a context for meaning making is thus an important part of narrating."*

How did I choose to proceed? In the letter informing me of the Board's decision to extend my probation, two reasons were cited for their decision: I had delivered poorly on monitoring, evaluation and research, which were the core functions of my post, and I had failed to make visits to projects to ensure that monitoring and evaluation were taking place. I therefore gave priority to addressing these two concerns, firstly by tackling what was seen to be a key aspect of my job description, "*ensuring that knowledge management is institutionalized and implemented at TVT*", and secondly, by visiting projects, although the purpose of these visits in the absence of any explicit monitoring and evaluation plans at that point was not clear to me. I will devote the rest of this chapter to portraying the way in which I set about developing an organizational knowledge work strategy, but before I do so I would like to describe a shift that occurred in my research approach as a result of my ongoing reflection on the situation I found myself in.

I have described earlier in this thesis that my thinking about knowledge had been strongly influenced by Eisner's (1997) presentation of knowledge as a "*temporary state*", and of Snowden's conception of knowledge as both "*thing and flow*". These views of knowledge had also been confirmed during conversations during CIG meetings, in which the contextual and relational nature of knowledge had been emphasized. But again I found myself learning what I already knew...I had thought that I knew what my relationship to The Valley Trust was: after almost 25 years of service I was certain that my future in the organization was as secure as any position in an NGO could be, and that my path to retirement would be devoted to strengthening and deepening the organization's commitment to evaluation and research in creative and appropriate ways. Yet abruptly I had found what I thought I knew swept from under me with startling swiftness, and I found myself without my accustomed anchor points - organizationally adrift, not sure about who I could turn to, and feeling that I urgently needed to strategize about my future. The metaphor of the dance no longer lent itself to how I found myself experiencing relationships, conversations, and interactions within The Valley Trust - my work and research had taken on a less reliable, less trusting dimension in which any organizational coziness had vanished. It seemed to me that I had

been plucked out of a time and space about which I felt relatively sure, and set down in a strange land where nothing seemed familiar. I needed to find my way out of that situation. I needed a new metaphor.

As I gave thought to the need to institutionalize knowledge work (or “knowledge management” as it was then still referred to in the organization) while at the same time accepting the fragility of knowledge, my mind went back to something I had heard during the CHESP programme: in referring to the pioneering nature of our work with service learning in South Africa, Jo Lazarus, the CHESP programme manager, had on more than one occasion observed that “...*we make the road by walking.*” This seemed to me to apply to working with knowledge at The Valley Trust so, curious as to whether this phrase was a quote, I went onto the internet and found the poem by Antonio Machado which has come to inspire so many insights during my research. I have quoted the poem on page vi of my thesis, but include it here for ease of reference:⁶¹

*Wanderer, your footsteps are
The road, and nothing more;
Wanderer, there is no road,
The road is made by walking.
By walking one makes the road,
and by glancing behind
one sees the path
that never will be trod again.
Wanderer, there 's no road,
only wakes in the sea.*

I love this poem. It expresses my experience of knowledge but not in any way that I could explain in a logical, coherent manner. For me it is more in the nature of a Zen *koan*.

Levering (2004:13) describes a *koan* as

⁶¹ Reading a poem and hearing it read are two different experiences, so I recorded myself reading the poem and have included it in the electronic version in the folder labeled “Machado’s poem.”

...a riddle with no apparent answer. It is used to train the mind to attain enlightenment (kensho or satori) in a sudden flash by guiding a person to think about the world in new ways...Koans are not nonsense; the realization toward which they point makes a deep kind of sense. Koans are concerned with the ways in which such apparent opposites as self and other, the eternal and the temporary, the universal and the particular, are united in every moment of our experience.

For me, this way of holding the idea of knowledge as paradox (as thing and flow, as hard and soft, as road and sea) is the only one that makes any sense. But it is also an intensely personal experience of knowledge, and difficult to portray to others unless there is a mutual willingness to become open to exploring knowledge as *process*, and to the ambiguities inherent in such explorations. In my view, the potential rewards are great, for as Eisner (1997:8) points out,

...alternative forms of data representation can provide what might be called 'productive ambiguity'. By productive ambiguity, I mean that the material presented is more evocative than denotative, and in its evocation, it generates insight and invites attention to complexity.

However, Eisner does go on to caution (p. 9) that ambiguity is

...not without its perils. One peril of ambiguity is the Rorschach syndrome: Everyone confers his or her own idiosyncratic meaning to the data. No consensus is possible. The data mean whatever anyone wants them to mean; or worse, no one knows what they mean.

I found that as I worked with Machado's poem, I needed to explore the idea of "the road" in different ways, and so started to draw and paint the *idea* of "road" as it lived in me. I will discuss one of these images in more depth later in this chapter, and will include others (such as the three monotype prints on page 149), to offer the reader a sense of what was unfolding in my own visualization of road as metaphor.



"Road and trees."

Monotype triptych. Clive Bruzas, 6th August 2008

I also began using a form of short poem,⁶² as described by Matthews (1994), in an attempt to come to the essence of "road" and what it might mean in the context of my evolving understanding of knowledge work as essentially paradoxical.

These poems are limited to nine words, with one word in the first line, two in the second, three in the third, then reducing to two in the fourth, and finally one in the fifth. Again, I offer these, interspersed with the text, not to illustrate any particular idea, but as experience. Some of these poems are linked, and where this is the case I position them in close proximity to each other.

*The
road is
not the road,
except for
now.*

Having outlined what was happening in terms of my growing use of arts-based methods in my inquiry, let me now return to portraying my efforts to "institutionalize" knowledge work at The Valley Trust. Before I found myself in the vulnerable position of having my probation extended, I had been pondering ways of expanding the conversations about knowledge work to a wider group of colleagues, beyond the relatively narrow confines of the small *ba* of the CIG. In saying that, I am not denying that the CIG conversations were already extending into the wider organization; however, I wanted to make that process a more conscious and facilitated one. However, my own situation introduced a sense of

⁶² Ralph Waldo Emerson notes, in his essay "The poet" (1906/1992:189) that "*We are far from having exhausted the significance of the few symbols we use. We can come to use them yet with a terrible simplicity. It does not need that a poem should be long. Every word was once a poem. Every new relation is a new word.*"

urgency, a feeling of pressure to "speed things up", that lead me to reconsider the process I had initially intended. It seemed to me critically important that I deliver something that could be viewed as evidence of my competence to do the job I had been appointed to do. At the same time, I did not want to turn my back on those ideals which, I was increasingly convinced, were essential if knowledge work was to become more integrated into The Valley Trust's practice. One of my key performance areas, according to my job description, was to "develop and implement a research strategy for the organization", and it seemed to me that if I approached this carefully, it would provide not only an opportunity to "deliver" a product, but also allow me to incorporate some of what I had been learning about knowledge work - in fact, it would allow me to develop not a *research* strategy but a *knowledge work* strategy.

In setting about this task, I gave a lot of thought to whether I should opt for a strategy or a policy, and in the end chose to develop a strategy. Why did I make this choice? Let me admit that my knowledge of policy is limited to the work which I have undertaken within The Valley Trust on organizational policy, and the insights which I have recently gleaned from serving as a member of a reference group monitoring the formulation of a national community development policy framework. My understanding of the conceptual dimensions of policy has been largely restricted to the sphere of health policy (as one of the strategies of health promotion, the Ottawa Charter of 1986 includes "build healthy public policy" as one required action for health), and has been informed by the writings of those working in the sphere of health policy such as De Leeuw (2007:51), who observes in relation to policy that

There are two extremes on a conceptual continuum: at the one end, there are those who believe a policy to be a rule or principle that guides decision-making. In many cases, such rules or principles might remain implicit. At the other extreme, policy has been defined as the explicit (and thus documented) formal decision by an executive agency to solve a certain problem through the deployment of specific resources, and the establishment of specific sets of goals and objectives to be met within a specific time frame. Legislation (with associated sanctions and incentives) could be regarded as ultimate policy statements.

The possibility of associating "sanctions" with knowledge work worried me. Let me explain my concern. On the one hand - given the stage of The Valley Trust's development - I seriously considered the policy option; while the organization had been restructured to enable greater effectiveness through integration, in my view we were functionally still at the differentiation phase, a stage in the development of an organization which presents several difficult challenges. Schaefer (1986:35) describes the key question of the differentiation phase as:

...how can one move from the personal, intuitive improvising mode of a smaller pioneer organization to a more objective, clear and functional way of meeting a larger organization's objectives... there is a trade-off between consciousness and form in meeting this challenge. The more conscious people are of goals and policies - the direction and guiding principles of an organization - the less there is a need for rigid forms and control mechanisms.

An imperative at this stage of an organization's development is good policy, and by "good" I mean policy that is thoughtfully developed, clear, and enabling. However, it should also, in my view, be developed in a participatory manner so that it becomes a widely accepted part of the organization's work without needing "buy in". Schaefer (1986:39) points out that for the differentiation phase,

Policy formulation is equally important. Where and by whom are policies to be defined? Plans and procedures are established and carried out in many parts of an organization, as are the other functions, yet what is important is that people are aware of what functions of leadership are being exercised by whom and how the results are communicated to the rest of the institution.

I would go further: to my mind, if management are seeking "buy in" from colleagues, the process is already seriously flawed - but perhaps this is simply a reflection of my own desire to maintain something of the "old" NGO culture of the organization, one in which shared commitment, dedication to a common cause, and deep trust were enough. But I acknowledge that these (naïve?) values may no longer be what are needed in a large

organization in transition, one attempting to become more integrated in the context of an increasingly complex external environment.

And then, although members of the CIG had reported during CIG meetings that there *was* a growing consciousness amongst colleagues about roles and responsibilities, and a deepening understanding of how the different parts interacted in relation to the whole, I believed that we still had a long way to go. And for me, the development of consciousness is critical. I passionately believe that we live in a time when both individuals and organizations need to strive for greater consciousness, greater wakefulness. We can no longer rely on the guidance of a charismatic leader or guru of any kind - or on unthinking, uncritical reliance on policy guidelines; life is too complex for that and we each need to take responsibility for our own decisions and actions, and I had explicitly attempted to promote the development of individual consciousness as part of the Facilitator Development Programme. In this I had been inspired by two writings by Alan Kaplan and Sue Davidoff; in the first article (Kaplan & Davidoff, 2007:28-29), the authors argue for a more wakeful consciousness if development initiatives are to mean anything:

Development interventions occur at the crossroads of consciousness. We may imagine, even hope, that they are primarily about changes in material circumstances, but this is never so. Development interventions - even where they deal with material circumstances - are about consciousness at the crossroads, or they are about nothing much at all, and are doomed to leave us simply repeating the same old cycles. And the crossroads of consciousness are met, to paraphrase Bernard Lievegoed in Towards the 21st Century, at "the boundaries of the shattered soul". When the old ways no longer work, we often fight to maintain them with increasing vehemence, or we fall asleep into a denial of the impending and already impinging crisis. This is the response of a consciousness that has come to take itself for granted, that is unable to see itself from the outside, to see itself afresh, to appraise itself critically. Not even the demise of the world as we know it is as challenging, as painful, as waking up to our own unconscious collusion with things as they are, or have become. Any developmental shift will entail taking up the challenge to wake up, to see oneself from the outside as much as from the inside, to become self-conscious. To be able to live both inside and outside one's culture, one's traditions and habits and routines, at the same time.

Anything less and the human being loses the freedom and responsibility of choice. And free and responsible choosing is the doom and grace of the human being.

In the second article (Davidoff, Kaplan, & Smith, 2008:9), they emphasize that

...the NGO is an organisation that - underlying all else that it does - stimulates and encourages itself and the people that it works with to think, above all else. Whatever else the NGO may do - different NGOs pursue objectives that stand even in opposition to each other - the NGO must be a thinking organisation, and must stimulate clear thinking in others. Without this, the intelligence needed to handle the contradictions that arise - out of its very essence - is lost. The NGO cannot afford to sink into jargon or discourse or boredom or routine; a formidable seeing, and the awokeness to respond to that seeing, is the radical project that every NGO must undertake.

So to me, a strengthened consciousness, a wakefulness, a thoughtfulness, is essential to The Valley Trust's practice, and in my view, an over-reliance on policy can put individuals and organizations to sleep. Rather than engage with each unique situation afresh, an over-reliance on policy and fears about an associated "policing" dimension, shuts down the thoughtfulness and insight required for a unique response in favour of sleepy, automatic reaction.

In thinking about the "institutionalization" of knowledge work at The Valley Trust, I therefore asked myself whether the introduction of a policy would promote or inhibit a greater consciousness about knowledge work. And here I should note that in using the term "institutionalization", I am not suggesting that the introduction of a policy or any other form of codified contract will, by itself, guarantee a desired outcome; organizational change is far more complex than that and requires a multi-layered approach. Indeed, Sims (1991), in his discussion of the institutionalization of organizational ethics, notes that organizations need to consider several variables such as the psychological contract between organization and employees, commitment, culture, as well as some form of code of ethics.

Having said all this about policy, I must also confess that the need (as I understood it at the time) for policy to require the incorporation of a punitive dimension was uppermost in my mind and weighed heavily in my decision *not* to opt for a policy: after all, my thinking went, if a policy can't demand compliance through the threat of some form of censure, then why have it? And to my mind, linking knowledge work to censure would simply reinforce the already existing perceptions of monitoring, evaluation, and research as being linked to policing and judgment. And Patton (1998:231) sounds a warning here: he cautions that *"When the stakes are very high for those involved, the accountability function of evaluation can lead to distortion of key indicators: what gets measured gets corrupted."* I wanted knowledge work to be something that excited colleagues, something that inspired and intrigued them. As it excites, inspires and intrigues me. But of course, there is no reason for a policy, strategy or code to enthuse anyone; perhaps enthusiasm and passion can be shared - if they can be shared at all - only through relationship (and even this is not guaranteed), but they cannot be "legislated", which was another reason for me to decide against a policy. Later, in June 2009, after travelling a lot further down the road, I was to reflect poetically on this question of relationships and their significance...

Relationships!
They clear
the road or
close it
off.

Why
can we
not connect? What
blocks the
road?

Suspicion,
mistrust, doubt...
all help to
obscure the
road...



And so I opted for a knowledge work strategy. In compiling the strategy, I drew on what I had learned from the Cooperative Inquiry Group, the literature I had been reading, and my own sense of what was appropriate in the context of The Valley Trust's stage of development as I understood it. I thought it important to frame the strategy within a set of key elements; I include the entire strategy as Appendix 4, but present the 10 elements

here as the basis for briefly describing the way in which I incorporated my various learnings.

The 10 key elements of the knowledge work strategy:

1. *It should be implemented over a period of time that allows a reasonable chance for it to succeed, from December 2008 to December 2011.*

In my view it was critical to allow sufficient time to implement the strategy, especially in the light of previous difficulties which had been experienced in incorporating monitoring, evaluation and research more consciously into the organization's work. Also, from a personal point of view, given that I was on extended probation, I wanted to ensure a realistic timeframe so as to delay any future decisions about my "poor performance" in institutionalizing monitoring, evaluation and research. And given my growing focus on relationship building and preference for knowledge-as-process, and on emergence and unfolding as essential aspects of knowledge work, I was anxious to create a "breathing space" for knowledge work.

2. *It should be appropriate to the identity of The Valley Trust.*

In Chapter 2, I attempted to sketch something of the nature of The Valley Trust as an NGO - something of its history and its recent transformations - and in Chapter 1 I indicated that NGOs might not be as effective as they like to think they are and, indeed, seldom have the means or perhaps even the will to inquire into the outcomes and impact of their work.

I have also tried to explain that working for an NGO has held a particular meaning for me and that, in attempting to become more business-like at one stage of our development as an organization, something was lost from our *being* as an NGO. It was therefore important to me, in drafting the knowledge work strategy, to take

into account the identity (being) of The Valley Trust. Ramalingam (2005a:8) reminds us that "...*'knowledge for development' faces a distinct, perhaps more complex, set of challenges*", and goes on to add (p. 12) that "*Overall it is clear that the process of developing knowledge-based strategies for development organizations clearly needs more than a 'drag-and-drop' from the methods adopted in the private sector.*"

Thus, in drafting the knowledge work strategy, I endeavoured to take our NGO status and the developmental, facilitative nature of our work into account.

3. *Given our identity, our knowledge work should be an integral part of our practice (ie. should not be an "add-on"); it should be useful (Patton, 1997), and it should be participatory (Reason, 1998a).*

I have emphasized elsewhere in this thesis the importance which I attached to action research and action learning, and the striving for "*A world worthy of human aspiration*" (Reason & Bradbury, 2001:1). I think that the inclusion of this principle was also my attempt to give expression to my desire for a form of living inquiry, of inquiry as an "*organizing idea*" (Bortoft, 1996:128) for our approach to health and development, although I acknowledge that this was undoubtedly premature.

4. *The strategy must build on what is already in place at The Valley Trust and the progress that has already been made.*

What was already in place? We had organizational guiding statements that committed us to "*monitor, evaluate and research our work in a participatory way to enhance effectiveness and contribute to knowledge creation and sharing*", and to "*enhance our effectiveness by working as a learning organization*", and we had an organizational structure that recognized the importance of monitoring, evaluation, and research in the form of a Division dedicated to these functions. We also had a history (albeit a sometimes chequered one) of taking a "scientific" approach to our work and documenting what we did, and we had in place the infrastructural basis of

a good information system, including our own specialist library; a network; a website (<http://www.thevalleytrust.org.za>); and a newsletter. Then we also had the learnings which had emerged from the work of the CIG - the beginnings of a greater shared understanding of how knowledge was understood in the organization, including the often paradoxical nature of knowledge (that it is both thing and flow, both hard and soft), that it tends to live in relationships rather than in databases, and that issues of ownership are crucial when considering the dynamics of knowledge flow. We had also discussed the importance of indigenous knowledge, and explored ways in which knowledge could be shared more effectively, including the question of sharing at the organizational level through utilizing different *ba*. In short, we had an emerging organizational framework (in my view, based on the figure of eight diagram) for knowledge work. I realize that, in attempting to summarize the learnings from the CIG in a few bland sentences, I am in no way doing justice to the rich process that was the CIG. However, I trust that in the previous chapter I have presented enough of the workings of the CIG to allow me to take the liberty of a summary at this point.

In addition, I should note that I had conducted an extensive literature review as part of my research, and was familiar with many of the writings in the field of knowledge management which I had, no doubt, filtered through the lens of my own experience at The Valley Trust to arrive at my preference (perhaps some would say bias) towards the "knowledge-as-process" part of the knowledge work spectrum.

5. *Staff capacity will need to be built for knowledge work across the organization; this will need to be done sensitively and appropriately, at a pace which takes into account organizational processes and rhythms, and in a manner which is thoroughly grounded in our practice. Such capacity building will include, for example, the strengthening of documentation skills, and the development of the ability to "read" developmental processes.*

I had long recognized (and I think that the CIG had endorsed the view) that knowledge work was not, and could never be, the work of any one individual or even Division. Monitoring one's work as part of an action learning process was a responsibility held by every staff member, and I understood my role (and that of the M, E & R Division⁶³) to be facilitators, coordinators, and champions of knowledge work. This is not to downplay the sometimes specialist nature of certain dimensions of knowledge work, nor to trivialize the importance of skills and experience. However, I have for many years been impressed by Bronowski's suggestion that what society needs is a "democracy of the intellect" rather than an aristocracy of the intellect (Bronowski, 1973:429), and I see a major part of my work being to share with colleagues whatever knowledge and skills I have built up over the years.

6. *Knowledge work processes will require skilled facilitation, probably by members of the M, E & R Division, although management as a whole will have a significant part to play. The requirement for M, E & R's facilitation role may decrease as the capacity for knowledge work strengthens across the organization, or the nature of the facilitation may change (for example, the mentoring role of the M, E & R Division may increase).*

Here there is an obvious link to the fifth principle, but with an emphasis on the facilitation and coordination of knowledge work processes, so as to avoid confusion and duplication.

7. *Given the identity of the organization and its expressed intention to work in a participatory way to create and share knowledge, there will be a need for creative forms in which knowledge can be "documented" and shared, eg. Patton (2002), Richardson (2000), and Springgay et al (2005).*

⁶³ The M, E & R Division has as its purpose *to assist The Valley Trust to learn about itself and its practice so that it becomes a more effective NPO which creates and shares knowledge so as to contribute more broadly to the health and development of individuals and communities* (The Valley Trust Annual Report, 2009:21)

I included this principle in recognition of the fact that many colleagues had, over the years, expressed discomfort with the way in which Western approaches to knowledge work had been privileged. I was also keen to open up the possibility for introducing the many and varied ways of engaging with knowledge work that were appearing in the literature, such as the use of poetry, dance, performance, and graphic art.

8. *When knowledge work is undertaken in partnerships, there will be a special need to proceed with caution. Partnerships may bring together different paradigms of knowledge, which could either introduce a positive creative tension or a negative struggle for dominance.*

The Valley Trust had as one of its objectives *"to be staffed by highly competent and committed personnel able to work creatively in teams and partnerships, with an emphasis on personal development, mentoring and coaching,"* and indeed we had been partners in several initiatives. I have already referred to NICHE and CHESP, and in addition to these were a formal Memorandum of Understanding with the University of KwaZulu-Natal; the Izingane Zethu partnership;⁶⁴ and the Collaborative Group,⁶⁵ which I have described in some detail elsewhere (Bruzas, 2003). Our experience of partnerships has been mixed, and one of our learnings has been the need to consciously address issues of power within the partnership. The potential pitfalls of partnerships and the implications of the term itself have been well documented by Taylor (2002).

⁶⁴ The Izingane Zethu intervention started as a partnership between The Valley Trust and two other NGOs: TREE (Training and Resources in Early Education) and LETCEE (Little Elephant Training Centre for Early Education).

⁶⁵ The Collaborative Group formed in 1998 as a loose association of NGOs working in the health sector in the province of KwaZulu-Natal. The members were: The Valley Trust, KwaZulu-Natal Progressive Primary Health Care, Centre for Rural Health, St Mary's Hospital, McCord's Hospital, Health Systems Trust, and Medical Care Development International. The Group met regularly for a number of years to share experiences and reflect on the various challenges facing the individual member organizations, but by 2004 its meetings had become intermittent and it was agreed to dissolve the Group.

9. *Given the need to integrate knowledge work into our practice, the role of leadership and management in actively and positively supporting the implementation process will be critical.*

This is a direct reference to the role of all levels of management in line with what had emerged during the CIG's discussions relating to Ramalingam's sixth question: *How does knowledge and learning link to vision, leadership and management?* I wanted leadership and management to understand that without their commitment, it would be difficult to ensure implementation of the knowledge work strategy across the organization.

10. *Progress towards the integration of knowledge work into the organization's practice should itself be subject to monitoring and evaluation, although as Hellström and Jacob (2003 p. 57) point out,*

When evaluating KM programmes we are...trying to hit a moving target, because when we advance, the goals change due to what is learnt in the process - indeed if they do not change we may not be advancing at all.

Of importance to me was the need to make transparent the process of developing and implementing the organization's knowledge work strategy. I was determined that the process itself should be subject to the same monitoring and evaluation requirements that I was expecting of the rest of the organization. In addition to this, I obviously saw the knowledge work process at The Valley Trust to be a research project in its own right, over and above its being the subject of my doctoral studies.

✪

I need to emphasize at this point that I saw the knowledge work strategy which I prepared as a draft. I completed the first draft and circulated it to the Leadership Team and managers shortly before we closed for the 2008 Christmas break, with the agreement that

we would meet to discuss it when we returned to work in January 2009.⁶⁶ During the Christmas break I spent many uncomfortable hours reflecting on the events of 2008, wondering what the decision of the Board would be about my future at The Valley Trust, and pondering about the knowledge work strategy. By the time I returned to work in January 2009, I was anxious to meet about the strategy.

The meeting took place on 7th January 2009, and was attended by The Valley Trust's management, with the exception of one colleague⁶⁷ who was still on leave. The meeting was largely supportive of the strategy which I had drafted, with one exception, and that was a critical one for me: the way I had proposed that we structure our home weeks. I had seen the inclusion of an "extended" All Staff meeting as the opportunity to follow on from where the CIG had left off, but this was considered by some colleagues to be impractical, and furthermore would ignore the fact that reflection and learning were happening throughout the organization on an ongoing basis. Indeed, I did recognize the importance of this, but was concerned that if knowledge work was to be viewed as my responsibility, I would need a more formal opportunity - an organization-wide *ba* - out of which learnings could be documented and shared. In the knowledge work strategy (pp. 6-7), I had included the following suggestion:

Creating appropriate space-time (ba) for knowledge work. *It is envisaged that, with time, knowledge work will become an accepted part of the daily work of every staff member. However, to reach this point, a structured process will be adopted to create the*

⁶⁶ I should add here that a few members of the CIG (Glen, Liz and me, with apologies from Claudia and Jabu) met for one last time on 28th October 2008. The meeting was largely a reconnection to what the CIG had covered during previous meetings, and a discussion about possible roles for the M, E & R Division. It was helpful in that it provided some stimulus to thinking about the work of the M, E & R Division, but didn't contribute anything at that stage to the development of the knowledge work strategy.

⁶⁷ In this chapter I have avoided the use of real names. Although I had mentioned colleagues by name in my first draft of this chapter, one colleague expressed discomfort about my having done so, given the fact that I touch on a number of tensions which arose at this stage in the evolution of knowledge work within the organization. I have therefore opted to use the term "colleagues", but in doing so I do not include "the colleague" to whom I refer in Chapter 3; this member of staff had already left the organization by the time the events which I describe in this chapter occurred.

time required for knowledge work processes to be undertaken. The primary ba will be the home week. At present, home week is held once every two months, and this frequency may need to be reviewed. It is also suggested that home week be extended by one day. The process proposed for home week is as follows:

Monday	Tuesday	Wednesday	Thursday	Friday
	<i>As knowledge work becomes a more integral part of our practice, preparations for home week will occur in advance...</i>	<ol style="list-style-type: none"> 1. Plenary for welcome and orientation. 2. Reflections following the individual-pair-team format. 3. Documentation of stories, etc. 4. Sharing knowledge in divisions. 	<ol style="list-style-type: none"> 1. Preparation for plenary sharing. 2. Plenary reconnection. 3. Sharing of knowledge in appropriate formats. 4. Drawing out learnings. 	<ol style="list-style-type: none"> 1. Plenary: housekeeping issues. 2. Divisional meetings.

On the Wednesday of home week, colleagues will be encouraged to reflect, as individuals, on what they have been doing during the past two months; guidelines will be provided for this process. After a suitable time of individual reflections, individuals will share their reflections with a colleague and receive feedback, in preparation for sharing within teams. This will be followed by sharing within divisions (Note: members of the M, E & R Division will be available to facilitate this process if necessary). At some point, the experiences and learnings must be documented; this may happen at the individual, team, or division level. On the Thursday of home week, staff will reconvene in divisions to prepare presentations for plenary sharing; these presentations may take the form of role plays or other performance; photographic displays; videos; stories; etc. the only requirement is that the presentation must reliably reflect the reality of The Valley Trust's work. After these presentations (which will be appropriately documented by the M, E & R Division), time will be devoted to drawing out learnings of value across the organization. Again, these will be documented. The Friday of home week will then be available for housekeeping and divisional meetings.

Following each home week, the knowledge which has been "collected"⁶⁸ will be processed by the M, E & R Division, and then made available in the following ways:

- (i) Written documents and photographs will be made available on the network. From here they may be accessed for use in report writing, proposal development, and as a resource for workshops, conferences, training events, etc.*
- (ii) Written and photographic material will be shared through the Newsletter.*
- (iii) Written, photographic, and video material will also be shared via the website.*
- (iv) Material of any form can be requested from M, E & R. Support will be available for hard copy, electronic, or video/DVD formatting.*

But it was decided during the meeting to keep the All Staff meeting as two day event, and to review progress from time to time. I therefore amended the strategy accordingly.

8088

We ended the meeting with everyone completing the "Five competencies matrix" which I had adopted from Ramalingam (2006) (refer to Appendix 5) as one tool which could help us to evaluate our progress by establishing a rough "knowledge baseline".

I felt ambivalent about the meeting, but at the time couldn't say why. The group had been largely supportive, with the only real dissension expressed in terms of my suggestions for Home Week, and there had been a commitment to incorporate a greater consciousness about knowledge work into our annual planning. Admittedly, the strategy had not been "approved" and still had to be presented to the Board, but what had I expected? Unqualified approval? (It was, by my own admission, a draft, and I had asked for input). A greater shared understanding of knowledge work at The Valley Trust? (After all, everyone

⁶⁸ Here it is important to note that much of the knowledge that may be shared through these home week processes would be tacit in nature, and as such would resist "capture" in the conventional sense. However, knowledge shared in this way should influence practice, and managers and coordinators would be encouraged to look for and document, changes in practice.

at the meeting with the exception of two colleagues had been part of the CIG, and I had been surprised at this meeting by the emphasis on the need for knowledge work to happen on a "daily basis" and not only during Home Week - surely the different forms and processes of knowledge work at different "levels" was exactly what I had attempted to illustrate in the figure of eight diagram).

Looking back now, I think that my frustration originated from my understanding that the need for an organizational *ba* had been one of the key learnings which had emerged from the CIG, and I was becoming increasingly convinced that the type of organizational change that we were striving for (as I understood it) could not be "managed" into existence. I had been struck by the ideas expressed by Shaw (2002), who proposes (pp. 11-12) that

...if organizing is understood essentially as a conversational process, an inescapably self-organizing process of participating in the spontaneous emergence of continuity and change, then we need a rather different way of thinking about any kind of organizational practice that focuses on change.... The question for us all is what do we think we are up to, how are we to account to ourselves and to others for the activities we initiate, support or discourage? How are we to explain what we do and don't do? How are we to think about our contribution? In other words, how are we to practice?

To me these questions felt particularly pertinent: I felt them resonating with my own evolving ideas of "organization", but they also seemed relevant because I was acutely conscious of the Board's focus on what *I* was up to, and the urgency of my need to account to the Board for my performance. I was anxious to see something in place which had a chance of yielding the type of results which I felt would count in my favour, and over which I would have some control.

After the meeting I made the required changes to the knowledge work strategy, in terms of making the suggestions for Home Week more flexible, and added two appendices: the first on the term "knowledge work" which I had introduced in preference to "knowledge management", and the second on the figure of eight diagram.

My next step was to present the strategy to the Board, which I did at a meeting on 4th February 2009, and felt that the presentation was well-received.



While the discussions about the strategy were going on, other aspects of organizational life continued, and in my description of the events that occurred over the next few months I will draw heavily on my eighth and ninth writings, which were dated June 2009 and September 2009 respectively. During the third week of February the organization engaged in a two day reflection process. I facilitated some of the process, and noted in my monthly report for February 2009 that

I thought that the two day All Staff meeting on 19th and 20th February went well, and I was especially pleased with the way colleagues engaged with the activities which I facilitated to reconnect to what each team is setting out to change. One colleague mentioned to me during the activities that this was the first time that she had really understood "people centred development", and I was encouraged to see how the nature of the conversations around health, development, and change have deepened, although this is not to say that we cannot take our conversations a lot further.

There seemed to be a lot of enthusiasm and commitment demonstrated over these two days: in an M, E & R Division meeting to reflect on the All Staff meeting, my colleagues observed that although they were still not clear about where M, E & R "fits in", there seems to be a lot of work being done on the ground, and a lot of potential for M, E & R to get involved.

And so I come now to The Valley Trust's annual planning process, a period when I thought that the organization accelerated along the knowledge work road. Following on from the development of the knowledge work strategy, I had developed and circulated a set of "M & E guidelines" (attached as Appendix 6) and discussed these in a meeting with colleagues from the Programmes Division. For planning purposes, I asked Programmes to complete two forms for each project: an activities monitoring form to document their interventions (for

example, training; home visits; workshop facilitation; etc), and a results map (Grove, Kibel, & Haas, 2005). The results map encourages users to ask what changes they expect to see as a result of their work, and recognizes that change in complex contexts can be of three different types (episodic, developmental, and transformational), and can occur across three domains of impact (the individual, the organizational, and the societal). Given our growing recognition that our work (and indeed, development work in general) was becoming increasingly complex (Rihani & Geyer, 2001), I had thought that the EvaluLead model described by Grove *et al*/was strikingly appropriate. And on the whole, I thought that our planning process worked very well, with colleagues in Programmes coming up with largely well-thought-through plans. In some cases, the activities monitoring plans tended to reflect what donors expect from us, and in one case the activity monitoring plans were sound (in terms of what we report back on to the donor) while the associated results map was very confused (we couldn't say what the results of our interventions are likely to be.⁶⁹) I provided detailed feedback and encouragement for each set of plans, and looked forward to working with colleagues in Programmes to review progress after the first month of implementation - April 2009 - to see if the tools were adding value to their work.

However, before that could happen, a comment I made at a meeting made me question the manner in which I had developed the strategy. My comment related to the way in which a particular presentation had been prepared, and how it could have been improved through a more integrated approach. One of my colleagues disagreed, pointing out that we *had* spoken about the presentation, and then went on to indicate that anyway, I had developed the knowledge work strategy in isolation from other colleagues.

I felt stunned by this, as in my view the organization had been talking about knowledge management for years, to the extent that it has long been included in our guiding

⁶⁹ Of course, there is always the chance that the results of our interventions will be unexpected. However, the use of the EvaluLead model is not intended to yield foolproof plans, but to encourage practitioners to think in terms of process and impact, rather than only in terms of activities which may or may not have any impact at all. Ideally, all plans should also be co-developed with our clients/communities.

statements. I had also convened the *CIG* (on which there were representatives from all departments of The Valley Trust), and had circulated most of my knowledge work writings and invited input. I had also, since April 2008, circulated all my monthly reports to the other Senior Managers and Director, and invited comments. We had also discussed the strategy at the meeting in January 2009, and I had modified it (at the request of those present at the meeting), before presenting it to the Board. In the light of this observation on the way in which I had developed the strategy, I found myself wondering to what extent the strategy was accepted within the organization. Should I have demanded signatures on the strategy to indicate acceptance? (Was I in a position to demand anything?) Should I have developed a policy which could have *compelled* compliance? I had avoided these actions, again thinking that encouragement, support, and clear guidelines would be preferable to a top-down imposition of knowledge work, which in my view would have located knowledge work within a managerialist framework, generated resistance, and would in all likelihood have been undermined. Most importantly, was I deluding myself into thinking that the knowledge work strategy had been a process of co-creation? Admittedly, the number of colleagues who had participated in the *CIG* had been limited, and in retrospect I would probably have convened the *CIG* differently,⁷⁰ with wider representation than those I had initially regarded as "self-evidently" the right group to participate (see page 45), so that the conversations about knowledge work might have had the chance to permeate the organization more thoroughly.

And I have to admit that the strategy *was* in large part a reflection of my own inclinations and biases, formed by my many years in the organization, my views on research, and my thorough reading of the literature. As noted previously, I had conducted an extensive

⁷⁰ At the time of preparing my research proposal, I had intentionally left the composition of the *CIG* open, perhaps intuitively knowing that the "right" people would come forward. However, the feedback which I received on my proposal asked me to be more specific about the composition of the group, and I therefore felt persuaded to include names, even though at that stage I had not approached anyone to join the group. Having committed a set of names to paper, I felt obliged to follow through and invite that specific group to form the *CIG*, thus in a sense closing it off to other potential members.

survey of the knowledge management literature, and although I had not shared this full range of readings with the Cooperative Inquiry Group, it was my view that there was already an implicit leaning toward the "knowledge-as-process", "softer" side of the spectrum rather than the more technical "knowledge-as-thing", "hard" side of knowledge management. (And even as I write this, I recognize that what I have written may be interpreted as an "either-or" dichotomy, rather than the "both-and" approach which I like to think I have been promoting). So when I say that the strategy was a reflection of my views, this should not in any sense be understood as downplaying the importance of the views of my colleagues with whom I had engaged in the Cooperative Inquiry Group, and of the powerful formative influence of the many conversations which I had over the years with a range of colleagues. But perhaps there is a great deal of truth in Maturana's (2001:12) suggestion that

When we claim that we are proposing a rational argument for something, the grounds that give validity to that rational argument are arbitrary. That means we choose them out of our preferences. We develop our preferences and then we present a rational argument to claim that we should have a rational argument - all based on some basic premises that we have accepted a priori, because we want them.

☪☪

*Turning,
twisting, the
road winds on,
turning, twisting,
turning...*

☪☪

Toward the end of April 2009 I suggested that the M, E & R Division get together with the Programmes Division to see how we could take forward those M & E dimensions of the work

that had come together so well in the annual plans. A meeting was set for 5th May, and was attended by representatives from both Divisions. We started off by each representative saying what he or she expected from the meeting; for me it was clear: I expected to now work directly with colleagues in Programmes around the M & E plans which they had developed, to see how the work was progressing, to see how the documentation was going, and provide any support that I could. However, the expectations from colleagues in Programmes seemed less clear; there was talk of "structures and responsibilities," and a desire to "understand the work before moving forward." It seemed that Programmes were reflecting every Friday, but it was admitted that the way things were working was an "interim step", and that the Division hadn't had time to sort things out in detail. By this point in the meeting I felt confused. Why did it seem so difficult to take what, to me at least, was the obvious next step? I noted in my journal:

What is this meeting about? There seems to be a lot of unspoken tension in the room.

Programmes is asking for more time to "put systems in place", and [a colleague] is asking that M, E & R doesn't interact with Programmes around M & E until these "systems" are in place.

So what is going on? (Journal: 5th May 2009).

The meeting seemed to have stalled, and even my request to meet with one or two teams on a very informal basis, just for me to "get a feel" for how things were going, was met with resistance. So I agreed that Programmes should put the required systems in place, which they undertook to do during the week starting 11th May 2009, so that we could meet again before the end of the month. However, for a variety of reasons, colleagues in Programmes found themselves unable to meet as they had intended, and so their meeting to discuss systems was pushed back to June, with a joint M, E & R and Programmes meeting scheduled for 26th June.

At that meeting it was reported that Programmes had met, but had been unable to come to any conclusions which would allow the two divisions to work more closely together. We proceeded to discuss the need to "define levels of M & E - what does Programmes do and what does M, E & R do?" This matter of the "boundaries" of M & E work seemed to be

emerging as a critical one which I had failed to adequately address in the development of the strategy and the M & E plans, and it obviously required further discussion. There was, for example, the matter of lines of accountability to take into consideration: although I felt that my job description clearly laid out my responsibilities, these needed to be applied in the context of everyone else's job descriptions. For example, in matters relating to M & E, to whom were colleagues in the Programmes Division accountable - to me or to Programmes' management? Looking back on it, the issue of boundaries was probably related to unspoken questions about power, but as I will describe in the next chapter, questions about power were ones I had been trying to avoid. The meeting closed with no clarity about a way forward, but the conversation had been a helpful one in terms of highlighting issues which, up until then, I had failed to take into account.

✪✪

Before I describe the turn of events after the inconclusive meeting on 26th June 2009, I



would like to mention that in addition to the organizational events which I am describing, I was also participating in two activities which I can best describe as engaging with the upper loop of the figure of eight diagram, that aspect of the lemniscate which represents knowledge sharing and the organization's attempts to contribute to the broader discourse around health and development. It is also that area of our work which relates to Ramalingam's (2005:iii) eighth question: *How does the knowledge programme address the external aspects of knowledge and learning work?*

"Coastline"

Watercolour (Clive Bruzas, November 2008)

Some time before I had been invited to serve on a reference group to guide the formulation of a national community development policy framework. This involved attending meetings in Pretoria, and a workshop in East London on 25th November 2008. It was while flying low along the Wild Coast to East London that I gazed down on the green and brown hills overlooking the sea, and noticed how the sandy roads meandered over the hills. I imagined that, at ground level, it would be difficult to tell where these roads were going unless, of course, they were well known to the traveler. From a distance, however, one could see a pattern and a direction to the roads, and it occurred to me how intimately and personally immersed I had become in the development of knowledge work at The Valley Trust. At one level this was perfectly understandable: it was my job; it was what I was employed to do and it was enshrined in my job description. On the other hand, had I become so close to it that I could no longer see the bigger picture? Armson and Ison (2001:unpaginated) note that *"Recognizing and evaluating options for purposeful action in a situation is constrained because what the practitioner is able to perceive is conditioned by his or her history and traditions of understanding,"* and I accept that it was possible that my immediate history in the organization was limiting my perceptions.

The second activity was a short-lived stint as a member of the Development Bank of Southern Africa's (DBSA) Intellectual Capital Think Tank. I had been invited because, after attending a previous DBSA meeting (in December 2008), I had submitted a written reflection (in which I had argued for the inclusion of NGO voices at events where knowledge creation was debated), and this had apparently been well-received. So I attended one meeting on 28th February 2009, made a brief joint presentation on health with another participant, but was subsequently unable to learn anything more about the process. My e-mails went unanswered, and the DBSA website carried no mention of the initiative. This left me wondering whether, in fact, one lone voice is able to carry much weight, especially in meetings where academic voices and those of large institutions dominate.

And so to start bringing this chapter to a close...Stake (2000:441) observes that

Many a researcher would like to tell the whole story but of course cannot; the whole story exceeds anyone's knowing, anyone's telling. Even those inclined to tell all find strong the obligation to winnow and consolidate. A continuum runs from telling lots to telling nothing.

This has been a difficult chapter to write, and I have found myself winnowing and consolidating, hovering between telling too much and too little, and hoping that in the end the reader will understand my dilemma. Reason and Marshall (2001:416), in referring to engagement with the personal process of inquiry, note that

...engaging in the inquiry process may touch on old hurts and re-stimulate old patterns of response...Research in this mode may take people to the edge of their capabilities and beyond, so from time to time most pieces of research hit a more major crisis - a life issue arises which will not go away, cannot be resolved in the relatively short term. At these times it is important to acknowledge the significance of what is happening, to affirm it as a longer-term process, and to attempt to allow space for the issue to find its own resolution.

This has certainly been the case with my process of writing inquiry. As I have attempted to portray the road I walked during the few short months covered by this chapter, I have experienced again something of the pain, confusion, and hurt that I experienced back then, and while my appointment was confirmed by the Board at the end of March 2009, the experience undoubtedly resulted in changes in myself which have been difficult to come to terms with. Nevertheless, while many of these changes have been painful, they included significant learnings about myself and provided insights into the organization and its workings, and for that I am grateful.

I think that it is also important to note that, while I have touched on some of the tensions which we experienced in the organization during this period, I do not believe that these should be seen in a negative light. Indeed, it is often through grappling with tensions that progress is made. Clandinin *et al* (2010:84) draw attention to the importance of tensions and observe that

Thinking metaphorically, tensions could be seen as marking the cracks or fissures in what might, at first glance, be a smooth story. Beginning to attend to the cracks creates the possible spaces for inquiry. It is in the cracks where inquiry spaces are made possible, that is, where there is possibility for retelling lives. Within these cracks or fissures, relationships of trust, in which participants and narrative inquirers can feel safe in their vulnerability as experiences are storied, tensions revealed and articulated and new stories imagined are crucial.

Leonard Cohen expresses a similar view more poetically. In his poem *Anthem* (L. Cohen, 1993:373-374), he advises us to *Ring the bells that still can ring/Forget your perfect offering/There is a crack in everything/That's how the light gets in.*



But there remain a number of key learnings that I must narrate before closing this chapter. The first revolves around the creation of another road image, the one on the title page of my thesis and reproduced here on the right. It was one of the images I created while trying to understand the essential nature of "road", and I started with a watercolour and collage of tissue paper to indicate the presence of large boulders, the ones which seemed to be blocking the road at almost every turn. I had included a watery blueness at the bottom of the road, to represent "the wakes in the sea" with which Machado concludes his poem. The image took on the mood of early evening, with a waxing moon and purple shadows, and it seemed to me that it needed more darkness,



"The road"
Mixed media (Clive Bruzas, 17th
May 2009)

more night, which would better portray my feelings about the struggles I was experiencing in implementing the knowledge work strategy. So I started darkening the painting from the bottom right corner, but when I reached the road I realized that I had brought the painting as far as it needed to be. There was a certain incompleteness to it which I liked, and which resonated with Pigrum and Stable's (2005) concept of "*gegenwerk*" - the work toward the work but also away from the work - which allows a space for the viewer to explore the painting in terms of their own experience (how would someone else take it further?) What the drawing was saying to me is that the road (our footsteps) moves forward between the darkness and the light, and that much of the work is to keep those forces in balance. The road also does not exist by itself; it is defined (at least in part), by the landscape through which it wanders, and so the organizational landscape, with all its tensions and power struggles and confusion and passion and pain are just as important as the road itself. Indeed, these *are* the road, and are to be celebrated as such...

*Walking
the road...
dust and blood
bless my
feet.*



Two more learnings emerged during this period as a result of stumbling upon two readings, again demonstrating the synchronicity with which relevant readings appeared at just the right time. The first was an article by Laine (2007), called "*It's the sense of touch': skin in the making of cinematic consciousness,*" in which I was astonished to find an analysis of the film "Crash", which we had viewed during the fourth meeting of the CIG. While I had introduced the film as a means to observing our own fluctuating sympathies and antipathies, I now saw another, deeper dimension to it. Laine points out (pp. 35-36) that in the film

...causality is replaced with disentangled lines of action that randomly intersect, and that are almost impossible to reconstruct in an exact chronological order, at least from memory. As a result, the spectator's experience is not about constructing meaning along some sort of logic of cause and effect, but rather about forming patterns along how different points of time and space coincidentally traverse.

Suddenly it seemed to me that there was another way of seeing the apparent tensions between the M, E & R Division and the Programmes Division: it wasn't necessarily about knowledge work being rejected or marginalized, or about the M, E & R Division (or myself) being deliberately excluded from what should have been joint activities, but it was - at least in part - that colleagues in the Programmes Division were so caught up in the complexity and stress of their own transformation processes that knowledge work was simply very low down on their agenda. We engaged - when we engaged - in a rather *ad hoc* manner, unless a requirement from a donor demanded a focused and specific monitoring or evaluative intervention. There was no "*logic of cause and effect*" (in the sense of deliberate action to marginalize knowledge work), but rather that our relationships were frequently taking the form of "*disentangled lines of action that randomly intersect.*" Of course, this still didn't fully explain why our attempts at greater integration, and at implementing the knowledge work strategy, were meeting with only limited success at that point. But it certainly helped me to "de-personalize" the issues and to start to see the bigger picture that I had glimpsed from the plane on my way to East London.

And to be fair, there *was* engagement between the two divisions during the period which I am describing although, as I noted above, it tended to be rather *ad hoc*. The M, E & R Division was, for example, assisting with the on-line capture of health communication data as required by The Valley Trust's largest donor; we were also using this data to update our own spreadsheet-based "tracking tool", which allowed colleagues in Programmes to see, on a monthly basis, how they were doing in terms of reaching their health communication targets. The M, E & R Division was also capturing data from the Umndeni Care Programme, an innovative intervention offering counseling and testing at household level, and producing

monthly updates on the progress made. In addition to this support, as a member of the Quality Assurance Committee I was providing feedback to the Programmes Division on donor reports, and occasionally on proposals, but unfortunately this feedback tended to relate to changes of a more cosmetic nature, given that reports and proposals were usually reviewed very close to submission deadlines. What was missing for me in these engagements was *depth*: it seemed that monitoring and evaluation was still functioning at the level of data, and I was convinced that we had the skills and experience to take it further.⁷¹ I was keen to be involved in the *use* of the data that was gathered; I have been strongly influenced in my approach to monitoring and evaluation by the work of Michael Patton (I have read a lot of his writings, and attended an "advanced course in evaluation" facilitated by him in 2002), and he emphasizes a utilization-focused approach (Patton, 1997, 1999; Waldick, 2002). And then, Cohen and Uphoff, cited in Macdonald (1992:80-90), emphasize that in community participation for health, only involvement in decision-making and evaluation count as *significant* participation; my sense is that the same should apply within an organization committed to health promotion.

And the second reading? Ah, "*You bastard: a narrative exploration of the experience of indignation within organizations*" by Sims (2005). In this article, Sims points out (p. 1625) that

Organizational theorists have long made jokes about the gap between the relativist language of much of their professional discourse about the world and their capability of single-minded practical anger at others' behaviour. There are times when any relativism of view disappears in a cloud of heartfelt indignation. Then an interested, exploratory stance to what the other person thinks they are doing becomes impossible; it is replaced by a clarity that the other person is up to no good.

⁷¹ It seemed to me that in spite of the conviction which had been expressed during CIG meetings that knowledge work involved so much more than the capture of data in databases (critical though this is), we had at this point been unable to move beyond this aspect of knowledge work to any significant extent.

The result of this *"heartfelt indignation"* is a process of *"demonizing"* (p. 1626) one or more colleagues, or defining someone in the organization as *"a bastard."* Had I been bastardizing my colleagues? I had certainly been feeling a sense of indignation in that I felt isolated, but perhaps this was a consequence of a rather incomplete and thus limiting view of the situation in the organization. There was clearly something missing from my understanding of the situation (and no doubt there always will be; it seems to me that we can only ever hope for partial insight, partial understanding). However, there was another issue to be confronted, that of the multiple dimensions of power that I discovered living both within myself and within the organization, but that will be covered in the next chapter.



Let me now bring this phase of the story to a close, albeit one of convenience, because the process of clarifying roles, responsibilities, and boundaries continues. The striving for greater integration continues. Tensions still arise. But I think that slowly a greater honesty is also arising, a greater willingness to confront our challenges more openly. In referring to our challenges and tensions, I'm not suggesting for a moment that The Valley Trust experiences any more of these than does any other organization; what does perhaps make us different is our willingness to acknowledge the role that tensions and their associated emotions play in organizational life (and especially in knowledge work), and to work through them. Indeed, Fineman (2005:557) places emotions at the heart of learning, and notes that

Common experience would suggest that learning for both individuals and organizations (if "organizations" can learn) is emotional - driven, shaped and expressed through feeling and emotion. Accounts of fear, joy, excitement, ambivalence, gloom, tedium, apprehension, joy, shame, and pride are not hard to locate as people face new skills and tasks, respond to reformed organizational cultures, adjust to crises, learn to adapt to new role demands, or simply "learn the ropes" as novices in a new job.

And here I'm not suggesting that The Valley Trust has any flawless process for addressing organizational difficulties; each step along the road is a learning process, and as Pederson

noted in the quote I used on page 39, "*The past is given, the future is open, and the present represents the possibilities of the moment*". In each moment we have choices to make, and as Ben Okri (1999:15) puts it,

*We rise or fall by the choice we make
It all depends on the road we take
And the choice and the road each depend
On the light we have, the light we bend,
On the light we use
Or refuse
On the lies we live by
And from which we die.*

There's the road again. It was a good metaphor, one that I still think about a lot - what *are* those waves/wakes in the sea that were once road? I don't know, but it seems to me that they are often lapping at my heels when I glance behind and see the path that never will be trod again. And acknowledging that is painful, as painful as recognizing how slow my learning is - how it seems that I can only learn what I already know...

*Do
not look
over your shoulder -
there are
waves!*

✪

*Look
over your
shoulder! Do not
fear the
waves!*

Chapter 5: The Labyrinth

*You say I am repeating
Something I have said before. I shall say it again.
Shall I say it again? In order to arrive there,
To arrive where you are, to get from where you are not,
You must go by a way wherein there is no ecstasy.
In order to arrive at what you do not know
You must go by a way which is the way of ignorance.
In order to possess what you do not possess
You must go by the way of dispossession.
In order to arrive at what you are not
You must go through the way in which you are not.
And what you do not know is the only thing you know
And what you own is what you do not own
And where you are is where you are not.*

(T S Eliot, 1963:201)

The labyrinth imagined here is a spiraling movement through one's life as one practices attentive relatedness to oneself, other people, the world, and language itself. (Sussman, 1995:251)

*The
road turns
back on itself -
and becomes
Labyrinth
(17th May 2009)*

∞∞∞

I love the poetry of T S Eliot. In particular, his *Four Quartets* speak to me, resonate with my experience. I am intrigued by the way in which particular themes recur, how lines seem to turn back on themselves, and the spaces and pauses created by the layout of the lines. I'm also fascinated by the paradoxes in the poems, and the way in which these paradoxes recur. I find the poems deeply satisfying. I start this penultimate chapter with a quote from the second of the Quartets - *East Coker* - because of the way in which it mirrors, in words, my experience of walking a labyrinth. My experience of labyrinth walking lies at the heart of this chapter because of the way in which this meditative activity allowed me to *embody* the paradox of knowledge and explore the meaning of what was emerging from my research. I should emphasize here that this chapter does not follow chronologically from the previous chapter; rather, it offers another perspective on the events described in the previous chapter, and attempts to portray my engagement with inspirational learning.

How did I come to have the opportunity to walk a labyrinth? For the past three years, my wife, Anne and I have tried to spend some time each morning reading together. During the first half of 2009, we read Linda Sussman's (1995) book, *Speech of the Grail*, every chapter of which is introduced with a drawing of a different labyrinth. We became



"The labyrinth."
Photograph by Clive Bruzas.

intrigued by the labyrinths, and Anne decided to celebrate her 50th birthday in July 2009 by building a labyrinth in the back garden, and inviting a group of friends to walk it with her. She chose a rather unusual labyrinth to build, one from Sweden known as the "Virgin's Ring", and set about using logs and branches

to mark the lines. Thus it was that, until Spring when the rains came and the growth of new grass obscured the path, I was able to walk the labyrinth in our back garden. I walked it early in the morning by the faint light of the rising sun; I walked it in the still of evening; and I walked it at night, sometimes by candle light and sometimes by the light of the moon. Each walk was different, and each offered a different experience. In an attempt to demonstrate a labyrinth walk I have included a short video clip in the electronic version of this thesis (to view it, click on the folder labeled "labyrinth"), but the movement really has to be experienced in order to grasp something of the meditative possibilities of the walk.

Why was the labyrinth experience so important to me? On pages 13 and 14, I introduced Bawden's (1999a) idea of the inspirational learning subsystem, and noted that for me, using arts-based methods is a way to access this subsystem. In my experience, a "way in" is required because entering the inspirational learning subsystem is not often supported in our modern world, and is certainly not a common part of our modern consciousness (although an increasing number of publications, especially relating to the practice of a/r/tography,⁷² recognize and encourage the approach.) I have for years intuitively incorporated arts-based methods in my work, but when I adopted a heuristic approach for my Master of Commerce research, I found that drawing and painting became an essential and integral way in to what Moustakas (1990:28-29) terms the "incubation" phase of heuristic inquiry, that phase which *"...allows the inner workings of the tacit dimension and intuition to continue to clarify and extend understanding on levels outside the immediate awareness."*

In Bawden's framework, the inspirational learning subsystem interacts with the experiential learning subsystem, and it is at the intersection of these two learning subsystems that *meaning* emerges. The experiential learning subsystem is basically a form of action learning similar to the Kolbian cycle (Kolb, Osland, & Rubin, 1995), in which the

⁷² Springgay, Irwin and Kind (2005:899) describe a/r/tography as *"...a methodology of embodiment, never isolated in its activity but always engaged with the world."* The term derives from the multiple roles or identities of those who adopt the methodology: artists/researchers/teachers.

learner/researcher cycles through a series of steps or phases which allow learning and its associated changes to emerge; in Bawden's framework (p. 5), these steps are planning, acting, perceiving, understanding, and back to planning. However, my experience of working extensively with both colleagues and students from tertiary institutions suggests that, while these steps may facilitate a limited degree of learning, they do not necessarily facilitate the emergence of *meaning*, in the sense of allowing us to reflect deeply on our work and ask: *What is the meaning of what I am doing?* (And again I quote T S Eliot, who noted in *The Dry Salvages* that "*We had the experience but missed the meaning.*"⁷³)

⁷³ In this chapter I would like to clarify my use of three terms which I have been using: "meaning", "learning", and "knowledge", and the latter two I will bring into the flow of narrative a bit later. However, I feel it is important to say something here about "meaning", a term which is so important to me yet which is so difficult to explain and which I have been struggling to describe in the narrative flow. Perhaps this is because we use the word so frequently and often unconsciously in everyday speech (as in "*What do you mean by that?*" "*What do you think she meant?*" "*What does it all mean?*"), that we assume that everyone knows what we "mean" by the word "meaning." In my view, engaging with the *meaning* of what we do involves us asking deeper (or at least different) questions to those we might ask as part of a standard action learning process. Such questions are also often unsettling ones. This is, of course, not to say that action learning is without merit; it can be extremely useful up to a point and, as I shall suggest later in this chapter, it is the foundation for improving practice at the level of projects. But in the context of complex systems, and the need to respond sensitively as facilitators of human and social development, we surely need something more. Here I am not suggesting that in the context of my thesis I am using the term "meaning" in the profound sense of "The meaning of life," or as used by Viktor Frankl in his book "Man's search for meaning" (Frankl, 1959/2004). However, in recognition that everything is contextual, I am using the term to signify the need to explore the meaning of what we do in the context of what we say about ourselves as The Valley Trust: our explicit statements such as our vision and our objectives, our espoused approach, and the frameworks within which we operate, such as Primary Health Care, Health Promotion, and People-centered Development. To my mind, the creation of meaning hinges on the ability to reflect deeply on experience, as described by Alvesson and Sköldbberg (2000:245): "*Reflection means thinking about the conditions for what one is doing, investigating the way in which the theoretical, cultural and political context of individual and intellectual involvement affects interaction with whatever is being researched, often in ways difficult to become conscious of. When we reflect, we try to ponder upon the premises for our thoughts, our observations and our use of language. Consequently, reflection is difficult.*" In the absence of such depth, reflection may be limited to thinking about the "mechanics" of the experience, and may even encourage us to become better and better at doing the wrong or inappropriate thing through unconsciously strengthening and perpetuating an instrumentalist approach.

By linking the experiential learning subsystem to the inspirational subsystem, Bawden's framework addresses this critical question of meaning. The inspirational subsystem also comprises four steps, which Bawden terms meditating, focusing, accepting, and applying. I found that my experience of walking the labyrinth was another way to access the inspirational learning subsystem, with the slow, meditative pace lending itself to reflection-in-motion.

Others have written about their experience of labyrinths in the making of meaning: Pryer (2004) writes about labyrinth walking from the perspective of ritual and embodiment, and notes that *"By walking the labyrinth I came to understand in an embodied way that ritual is our primary form of communication,"* and Bickel and Jordan (2009) have published a multi-media presentation on labyrinth walking which, in their terms of reference, incorporates sacred epistemology, ritual, spiritual feminist, and trance dimensions. Their presentation can be viewed at

<http://www.ccfi.educ.ubc.ca/publication/insights/v13n02/articles/bickel/index.html>.

I should also mention that, although I have walked many particular roads, in the context of my research I have experienced "road" as metaphor and idea. In a similar way, although I walked a particular labyrinth, labyrinth as *idea* has become especially important to me. Borgeaud (1974), in his fascinating article on labyrinths, discusses labyrinths as idea, and notes (p. 2) that *"Although labyrinths are well known, no one has been able to localize the labyrinth"* (emphases in the original). He also suggests that the word *"...does not designate a building at all but rather the domain of the goddess..."* In addition to labyrinth as *idea*, I have also experienced labyrinth as *process*, a process that allows me to experience both centre and periphery as simultaneously occurring aspects of any given moment; this is another example of the "both-and" consciousness to which I have referred previously in this thesis. Although this experience began as a literal embodied experience of connecting centre and periphery through following the labyrinth path which folds back on itself and suddenly changes direction, I found that it remained as a way of thinking after the

physical labyrinth had gone. (This movement between centre and periphery can be clearly seen in the video clip in the electronic version of the thesis.)

I emphasize at this point that in this chapter, as I reflect on my experience of knowledge work at The Valley Trust, I am not attempting to generalize beyond the context of the particular case that I have studied - indeed, I do not attempt to do so anywhere in this thesis. That task I leave to my readers. Rather, I am attempting to portray my experience within one NGO over a particular period of time, and make no claims to the generalizability⁷⁴ of that experience. (I should also note that, while I have touched on the issue of generalizability earlier in this thesis (page 15), I feel that it is important to expand a bit on the topic here, in the context of this chapter.) Watts (2007:212), in his reflection on case study research, points out that *"The story allows the writer or researcher to hold out a choice so that the reader can pick and choose what is appropriate to the circumstances. The reader can determine the truth as he or she sees it."* So join me now as I walk the labyrinth, and attempt to share with you in words an embodied experience...⁷⁵

⁷⁴ The question of generalizability in case study research is an interesting one. Stake (2000:439) for example, states that researchers inquiring into cases *"...expect readers to comprehend the reported interpretations but to modify their (the readers') own. Thus researchers use the methods for case-work that they actually use to learn enough about their cases to encapsulate complex meanings into finite reports - and thus to describe the cases in sufficient descriptive narrative so that readers can vicariously experience these happenings and draw conclusions (which may differ from those of the researchers"*. Ruddin (2006:804) reports that this process whereby the reader seeks insights into their context through reading the research of others is termed by Stake *"naturalistic generalizability"*, and states that *"One must consider the situation from the perspective of the user"*. Flyvbjerg, too, (2006) takes up this question and suggests that it is a misunderstanding that case study research cannot be used for generalization; however, he, too, is careful to discuss the different understandings of generalizability at some length, and states (p. 227) *"That knowledge cannot be formally generalized does not mean that it cannot enter into the collective process of knowledge accumulation in a given field or in a society"*.

⁷⁵ I should explain here that I did not keep detailed notes on my thoughts at the time of walking the labyrinth, although I did reflect on the experience in my journal. Rather, I have reconstructed the experience using the method described by Ellis and Bochner (2000:751), who observe that *"...if you viewed your project as closer to art than science, then your goal would not be so much to portray the facts of what happened to you accurately, but instead to convey the meanings you attached to the experience....If these were your goals...writing notes at the time the experience occurred would*

It is early morning, not yet quite light, and I am walking the labyrinth. I have on a warm jacket against the cold winter air, and I feel more than see the twists and turns of the labyrinth as I slowly follow the path. The movement, the flow from centre to periphery and back again, starts to become my experience of knowledge work at The Valley Trust...

The Valley Trust is a large organization by NGO standards, with few opportunities amongst the busyness of day-to-day activities for colleagues to come together and share what they are doing. Even with the new structure in place, even with the emphasis on integration, we have a long way to go. How did I think I was going to "institutionalize" knowledge work across this rather rocky organizational landscape? And what did I mean by "institutionalization"? Was that simply something that remained with me from my CHESP work - this need to somehow pull everything together at the centre in a structured and, I suppose, controlled way in which I could feel certain of something? I trusted in the CIG to "disperse" or "cascade" the conversations we were having about knowledge, and I expected the Leadership Team to "carry" and manage the implementation of knowledge work, but why did I do that? When I convened the CIG, I had in mind a group that was "self-evidently" the right group to explore knowledge work, but fortunately the group turned out to include colleagues other than managers, and it became obvious that every member of the group had important insights into how learning and knowledge can be understood in the context of our work (and within their own individual contexts), although those insights were not necessarily expressed in the formal language (or should I say "jargon") of "knowledge management". The more I work with colleagues on an individual or small group level, the more I realize how extensive the knowledge within the organization really is. And yet it is often tacit knowledge, that type of knowledge which Nonaka and his co-workers have been so convinced can be converted into "explicit" knowledge. While this process of conversion held an initial appeal for me, my experiences during this research process have led me to largely

have been helpful, but not absolutely necessary. If you're writing about an epiphany, which you usually are in this kind of research, you may be too caught up in living it to write about it."

reject what I now perceive to be a rather mechanical approach to working with knowledge. It's interesting to note that others have also expressed this view.⁷⁶ Cook and Brown⁷⁷ recognized the shortcomings of the method and tried to modify it by introducing what they called "bridging epistemologies," but even this fails to take into account what Tsoukas⁷⁸ calls the "essential ineffability" of tacit knowledge. I've noted in my thesis Polanyi's⁷⁹ assertion that "...we can know more than we can tell", and while I agree with that, it seems to me that we can nevertheless try to "tune in to" each other's tacit knowledge - for want of a better phrase - through conversations, drawings, paintings, song, dance, and so on. I need to be clear about this, lest I be accused of simply promoting "conversion" in another guise; I am not thinking in terms of transferring one person's tacit knowledge to another person. I am thinking about learning-in-relationship - that if, in relationship with a colleague, we talk about what we know, or we attempt to picture it in some way with each other, probably again and again (although each time will be somewhat different), we will come to a deeper (but never identical) insight into what each other knows, and in the process our knowledge is likely to change as part of the continuous and ever-emergent flow of learning and knowledge creation. Schwandt⁸⁰ had some really fascinating things to say about this - I must look them up.

⁷⁶ I debated the best way to include references in this section. It seemed artificial to include them as part of my portrayal of the labyrinth walk, as obviously I would not at the time have thought about a date and page number, although I did think about particular authors and the ideas that they put forward. I have therefore elected to include the specific references as footnotes. This also introduces a certain distraction, in that the reader is tempted to interrupt the flow of his or her reading to refer to the footnote, but I nevertheless considered this to be the more authentic option.

⁷⁷ Cook and Brown (1999).

⁷⁸ Tsoukas (2005:410).

⁷⁹ Polanyi (1967:4).

⁸⁰ Schwandt (1999:458). "*When we seek to understand what others are doing and saying, we are always standing in this in-between of familiarity and strangeness*", and further down the same page: "*To be in a dialogue requires that we listen to the Other and simultaneously risk confusion and uncertainty both about ourselves and about the other person we seek to understand.*" Schwandt also quotes Gadamer on page 458, pointing out that "*...the miracle of understanding is not a mysterious communion of souls, but sharing in a common meaning,*" and goes on to draw on the work of Molander to point out (p. 459) that "*...common meaning can arise only in a dialogue wherein one does not simply*

So what does this mean for knowledge work at The Valley Trust, and in particular what does it mean for my work? At this stage I have an image or mental picture of knowledge work rather than a plan for knowledge work, an image which requires me to engage with both the centre and periphery of the organization at the same time, performing⁸¹ knowledge work in the role of organizational juggler, keeping the balls in the air, catching new ones, letting others fall, throwing some balls to colleagues to catch. This role requires the ability to coordinate rather than control, and while I think that there is a place for tools such as policies and strategies at the organization's centre, but these need to be of an enabling nature and should ideally be developed in a participatory manner which allows all colleagues to feel a sense of ownership toward them. It certainly needn't position me as/at the central point through which all knowledge work has pass, although I do think it helps to have one or more colleagues who are at least aware of the various knowledge work-related processes which are under way. And yes, I have to admit that I feel somehow slighted if I become aware of knowledge initiatives that have bypassed me in their planning or implementation stages; is this just conceit, or am I justified in thinking that if it's in my job description then damn it, it needs to be respected? I suppose that this highlights the fact that knowledge work can't be considered in isolation from any other aspect of organizational life: if I am learning that knowledge creation and sharing is an ever-flowing process that becomes stifled by attempts to conscript it, then perhaps part of my work is to motivate for a review of everyone's job description to make knowledge work responsibilities more explicit across the organization. There I go again, needing to firm it up, give it some sort of structure...

defend one's own beliefs or criticize what the other believes, but rather seeks to become clear about one's own knowledge and ignorance."

⁸¹ Schwandt (1999:455) has a relevant comment here as well: "...understanding and interpretation are not acts of an individual conscious mind but enactments, performances, or a kind of praxis."

All of which brings me to Ramalingam's sixth question⁸²: How does knowledge and learning link to vision, leadership and management? It seems obvious that leadership must have a role to play in knowledge work (and this was discussed in the CIG), but I see it now not as a tightly held managerial role, but rather in terms of Peter Block's⁸³ notion of "convening." This requires a different conception of leadership, that which Block refers to as the "social architect"; the skills required for this role include the ability to focus on who is in the room, care of the physical space of the meeting room, including a lot of interaction, ensuring that all the voices are heard, and focusing on strengths and assets rather than deficiencies. Such an approach also requires, I'm convinced, the willingness to explore a different way of thinking about leadership and leadership roles in general, and becomes part of paying attention to the whole organizational landscape within which knowledge work happens. But it's getting lighter... time to go in and prepare to head off to work...

✪

It is a weekend, and around midday I'm walking the labyrinth...

I'm always amazed at how dry the garden gets in winter, and how quickly everything recovers when the spring rains start to fall. Perhaps this is one manifestation of what Goethe⁸⁴ meant when he spoke about the need for a process of dying and becoming. Yet even in the driest corners of the garden, life flourishes. Here in the labyrinth I see the tiny blue Commelina flowers, and the strange bracket fungi on the dead branches that demarcate the labyrinth's paths. I know that if I turn one of the branches over I will see the tiny creatures that have sought shelter there, but let me not disturb them. Let me rather pay attention to my own somewhat disturbed thoughts...

⁸² Ramalingam (2005a:12).

⁸³ Block (2002:174-176).

⁸⁴ I have come across several different translations of this saying. The most recent one I have seen is in Zajonc (2009:115): "And until you possess it, this commandment: Die and become! you will be but a dismal guest on the dark earth."

I have noticed lately how I swing between excitement about some progress in knowledge work at The Valley Trust, and feelings of frustration when some setback occurs. I don't want to link this too directly to Goethe's saying about dying and becoming, but it often seems to me that I need to cultivate more equanimity to cope with these fluctuations in my work. Of course there are going to be setbacks - what else did I expect? But the pressure from the Board made it so hard to stay calm about the ups and downs of my work. Now, when my thoughts have been calmed by the walking, I realize that I need to approach my knowledge work from a far more holistic perspective, and see it as part of the gestalt of the organization. But of course, each of us brings who we are as an individual into the work situation, and our research processes are (if we are honest) deeply influenced by who we are and the road we have followed in our lives. In opting to take an autoethnographic approach to my research, I was conscious of the need to locate - and be as honest as I could be - myself in the research process, but it's easy to lose track of that. Patton⁸⁵ writes about using one's own experiences to garner insights into the larger culture of which one is a part, but I've found it difficult to apply that slippery term, "culture" in the context of The Valley Trust. I've heard colleagues refer disparagingly to the absence of a "reading culture" or a "writing culture" within the organization, and it would be easy to think that without these "cultures" there is little chance for the successful implementation of knowledge work. But I don't think that it's helpful to think about knowledge work in terms of "organizational culture". I think that it would be far better to recognize that the organization possesses an astonishing richness of talent in many different forms, some of which is writing, some reading, some story-telling, some singing, some empathy for community work, and so on. The challenge is to juggle these talents - not in any top-down, manipulative way - so that meaningful knowledge work can happen. And that's where another two of Ramalingam's questions⁸⁶ are so important. We started, in the CIG,

⁸⁵ Patton (2002:86).

⁸⁶ I have attempted to connect to Ramalingam's questions at several places in my thesis, and in this chapter I specifically reconnect to most, but not all, of them.

to explore his first question: How is knowledge and learning understood and applied? And I think that we made good progress, but it may largely have been limited to the CIG (although colleagues did say that the CIG conversations influenced other conversations to some extent.) But the structured, organizational-level conversations have been slow to take off; there have been some great conversations, but then we go through a dry patch when it seems impossible to get colleagues together. And the conversations need to be ongoing; in my view, it's the single most important thing we can do to perform knowledge work. And this brings me to Ramalingam's seventh question: What are the costs and benefits of learning and not learning? I think now that I would start with this question, make it number one. It seems to me to be to be a question about organizational values and organizational priorities. We can have knowledge work policies and strategies and implementation plans (which have in part been developed by me), but if we are not honest and realistic about how we really view the value of knowledge work, then we are setting ourselves up for frustration and the pain of strained relationships. And this is not a judgment; if the organization were to decide that it really doesn't have the time for knowledge work beyond the most basic gathering of data to monitor progress and report to donors, then that is what we should gear ourselves to do. But if we intend to "contribute to the broader discourse around health and development" (as I so grandly express it - is this just my vision?), then equally we need to allocate the time and the resources to that task.

And here I recognize that I bring a particular perspective and passion to knowledge work at The Valley Trust. I know that Chia⁸⁷ has drawn attention to the fact that most knowledge work initiatives privilege the representational form of Western alphabetic-literate cultures, and I recognize that there are other forms, but I also acknowledge my love of the artefact, be it a piece of writing, a recording, a drawing or a sculpture. And it's not that I see these artifacts as "knowledge." Rather, I see

⁸⁷ Chia (2003).

them as representations or snapshots of a particular stage or time in an ongoing learning process. Perhaps in the harder sciences such as physics or chemistry, such artifacts have a greater degree of permanence, but in the context of the work I do, I see them as far more...what? Tentative? Exploratory? I know that when I look back at my Master of Commerce dissertation, I do so with a sense of achievement and pleasure, but I also know that I would write it differently today. Does that diminish its value? Not at all. It is a record of my experience at that time (what I knew at that time), and any meaning that might emerge from it will emerge differently each time a reader engages with it. The degree of difference will depend on the experience that each reader brings, and the context in which it is read. The same applies to a painting or a piece of music - each is incomplete, and comes to life each time someone engages with it anew and makes new meaning. It is that constant and conscious process of engaging with my experience through reflecting deeply that I call learning.⁸⁸ For me it is perhaps best described by van Houten's framework,⁸⁹ where he emphasizes that learning occurs when we grapple with the three barriers that rise up to confound our learning. And what I see as representations of knowledge - those artefacts with which I so eagerly engage and which represent to me where their creators were at a particular time of their lives - can contribute powerfully to my learning process in many different ways. What was it that Picasso⁹⁰ said about paths and joining the dots and the form of a Minotaur?

⁸⁸ Clegg, Kornberger, and Rhodes (2005:149) explore learning not as a strategy or practice, but as a concept. They suggest that *"...learning, in that it might be applied to organizations, has (thankfully) not found the form of primordial signification that many organizational learning theorists yearn for; learning, as a concept, thus exists in its creation and performance rather than in its definition."*

⁸⁹ Van Houten (1995:17) proposes that there are three barriers to learning: the thinking barrier, the feeling barrier, and the will barrier. He suggests that *"The real change - the essential learning - takes place in the process of overcoming these three barriers: we begin to understand or comprehend something that was incomprehensible before. The world of our feelings has become ennobled, deepened or enriched. Often, we have also acquired an ability or a skill we did not possess before."*

⁹⁰ *"If all the paths I've taken were marked on a map and joined up with a line, it might represent a minotaur."* Quoted in Cohen (1995:78).

So in my organizational knowledge work I need to be aware of this constant weaving between my own preferences - perhaps I should be honest and say "biases" - and those of my colleagues (between self and other⁹¹), which in all likelihood are different to mine. This is why we constantly need to recreate/co-create meaning for ourselves, especially at the level of "the organization". I know that I place a lot of emphasis on this level, the centre of the lemniscate, but I do think it is important. If, for example, we are asked what The Valley Trust thinks about virginity testing, or male circumcision, or abortion, or any other possibly controversial issue, we need to be able to answer. It is not enough to say that the Director thinks this, or the Senior Manager for Monitoring, Evaluation and Research thinks that. We need to be able to provide an organizational response,⁹² and that requires that we talk about what we know and how we know it, even if - especially if - that knowledge is a temporary state, an expression of our best understanding at the time. Knowledge as flow, knowledge as a temporary state, is truly unsettling!

⁹¹ Lincoln (2010:5) lists "working the hyphen" as one aspect of the work still to be done in qualitative and new paradigm research: "Working the hyphen refers to studying the Self-Other conjunction, that fragile and sometimes fractious splice between ourselves as subject and object and those for whom we work, as subject and object." It is an area of my research to which I would like to pay more attention in future.

⁹² In emphasizing the importance of the "organizational level," I am not suggesting that I view "the organization" as a static structure. I like Harding's (2007) view that "Poststructuralist theories posit organizations as flows, processes of always becoming, of constant flux: organization is verb, not noun" (p. 1761). This makes sense to me: if knowledge takes the form of flow and process, ever-changing, then surely the organizations in which knowledge is created can also be viewed as flow and process. There are, of course, those aspects of organization which are "thing": the constitution, the guiding statements, the values. But in the same way as knowledge can be recorded at any given point in time as some form of artefact, so too can organization; these organizational artefacts will also evolve over time as the organization changes. For example, the constitution of The Valley Trust has been amended a number of times since the organization's inception. The first constitution is available in the archives and makes for fascinating reading in terms of the vision of The Valley Trust's founder, and many aspects of that first constitution still apply, but it has been changed as required by the organization's changing circumstances. This view of organizational becoming was also posited by Tsoukas and Chia (2002), and Clegg *et al* (2005:150) suggest that "...the becoming that is in organization and in learning implies a permanent non-rational movement such that, despite the best attempts of science, 'organization' can never be known or rationally defined, yet it might learn, become and be connected with." I am also not suggesting that what is known by "the organization" is separate from what is known by the individuals who work for the organization. Harding (2007:1761) even suggests that "There is no such thing as 'the organization' and 'the employed self'; rather mutual imbrication provides organization/self\self/organization."

It is early evening, and as I enter the labyrinth I glance upward, just as a flock of sacred ibis fly silently overhead in V-formation. I've been thinking a lot about the lemniscate, and whether or not it speaks to anyone other than me as an image for knowledge work...

The lemniscate is not a new image at The Valley Trust - it appeared in a much simpler form in one of our Annual Reports and has developed since then. Certainly it speaks to me as an image of knowledge work, depicting as it does a constant flow from learning in the field to learning at organizational level to sharing our learning and knowledge outside the organization, and then bringing back into The Valley Trust what we glean from outside to inform our work as an organization and in the field. Again these three levels are not necessarily distinct places, but may better be described as spaces⁹³ within which we operate. I keep coming back to this idea of knowledge as flow, as movement, even at the centre of the lemniscate which for me is so well described by T S Eliot's "still point of the turning world."⁹⁴ He writes about stillness and the dance in the same breath, as for me centre and periphery occur in the same moment. Perhaps we require more stillness for reflection, although colleagues always complain that there is never enough time for them to get through everything they need to do in the field. Is this the real reason, or is there a general reluctance to stop and reflect in case the process of inquiring deeply into what we are doing raises questions that are too difficult to deal with? Ramalingam

⁹³ Jacobs (2004:74), drawing on the work of Foucault, observes that "Whereas places are distinct locations and imply an indication of stability, spaces are constituted through movements and operations of bodies and minds."

⁹⁴ "At the still point of the turning world. Neither flesh nor fleshless;
Neither from nor towards; at the still point, there the dance is,
But neither arrest nor movement. And do not call it fixity,
Where past and future are gathered. Neither movement from nor towards,
Neither ascent nor decline. Except for the point, the still point,
There would be no dance, and there is only the dance."

has mentioned⁹⁵ this issue of time in relation to knowledge work, so the challenge obviously extends much further than The Valley Trust. And this relates to Ramalingam's third question: How do knowledge activities link to existing core functions of the organization? There can be little doubt that the prevailing view of The Valley Trust's core function is that it is facilitating processes that enable people to initiate and sustain their own developmental change processes (to quote our guiding statements), and this implies spending a lot of time in the field "doing." I don't deny the importance of our facilitation work - it is, after all, why we exist - but I do think that what we do would be more effective if we located it more consciously within an action research framework, which would require us to spend more time reflecting and consciously learning. And I know that I keep referring to "consciousness", but it seems to me more and more that we need to work on our own consciousness if we hope to facilitate a growth in the consciousness of others. I know that this may sound pompous - that our work is about raising consciousness - but it does seem to me that the need for a strengthened consciousness lies at the heart of much of our work. I've even committed to memory a few lines from Rilke in this regard:

Look, without knowing when,
we keep on slipping backwards from our progress
into some unintended thing, and there
we get ourselves involved as in a dream,
and there at last we die without awakening.

⁹⁵ Ramalingam (2005a:19): "The most common reason given by core staff members for not applying knowledge and learning tools is a lack of time to do so. However, this seems to be something of a red herring in a number of organizations. It is not the lack of time, but rather, the underlying principles by which time is prioritized...A major challenge appears to be to convince the relevant parties that knowledge and learning practices are not a solution to anything specific per se, but a means and a process for improving what is already being done."

Of course, everyone learns all the time,⁹⁶ although as I've noted in my thesis, that learning can take different forms and is not necessarily the alphabetic-literate form that I prize so highly. Certainly, at the level of field work - the bottom loop of the lemniscate - there must be a lot of learning-in-action (which is not necessarily the same, more conscious, thing as action learning), but it's there, and some colleagues do get together to talk about and even document that learning. Colleagues in our Social Plant Use Programme used to be especially good at that, but I haven't seen anything from them for some time. But I keep coming back to the still point at the centre of the lemniscate, that space of synthesis, the space of the dance where organizational learning-in-relationship can happen if the opportunities are well-convened. I have referred frequently in my thesis to the idea of ba, and I admit that I like both the term and the idea as I understand it. But I don't mind what we call it, as long as we can convene, on a regular basis, a gathering of colleagues for relaxed but deep conversation. And I accept that we won't get everyone together for every conversation. Not everyone is going to be in touch with all the work of the organization - that's an unrealistic fantasy. But we need to keep the conversations going. Increasingly I relate to Shaw's⁹⁷ approach to organizational change, one which seems based less on planned and structured interventions and more on the importance of being-in-the-process of ongoing change.

What then of the need to document and share knowledge? We need this too. For me this is another both/and situation. Even while my thinking about organizational learning, knowledge, and change tends toward process, flow, and the temporary, I can appreciate the value of documentation in many forms, not as definitive ends in

⁹⁶ For a good discussion of "learning as a way of being," see Vaill (1996).

⁹⁷ Shaw (2002:171) writes that, in her book, "I have been asking, 'How do we participate in the way things change over time?' meaning 'How at the very movement of our joint sense-making experience, are we changing ourselves and our situation?' This means inquiring into the ongoing local situated communicative activity between experiencing bodies that gives rise to intentions, decisions and actions, tool-making and tool-using. Such an approach attempts to explore the paradox that our interaction, no matter how considered or passionate, is always evolving in ways that we cannot control or predict in the longer term, no matter how sophisticated our planning tools."

themselves, but as tentative, fragile expressions of work (life?) in progress. And I'm happy to share them in that form. I'd be happy to stand up at a conference and tell stories about my work, and ask the audience to engage with me in making sense of them. Imagine the insights that could flow from such a process! The upper loop of the lemniscate might take on a very different nature if we could think of it in that way, rather than in the somewhat limited scope of conventional publications and presentations. This would also help us to think more creatively about Ramalingam's eighth question: How does the knowledge programme address the external aspects of knowledge and learning work? Likewise, engaging with students at institutions of higher learning also offers a lot of potential for mutual learning, but I have come to realize that there are fewer and fewer opportunities for this form of interaction as higher education becomes, in my view, increasingly constrained in terms of their options for creative collaboration...

✪

And now it is almost dark. The Spring rains have started and the grass has grown around and over the branches that demarcate the paths of the labyrinth. This evening will



*"The Virgin's Ring labyrinth."
Diagram by Clive Bruzas after the
drawing in Sussman (1995:147)*

probably be the last time I walk this labyrinth; I have made my way around the paths as best I can, and have chosen to enter and stand in the centre. I say "chosen", because that is the unique thing about this particular labyrinth - one doesn't have to enter or move through the centre. The paths of most labyrinths lead toward and away from a central area, and indeed, in the original story, it was at the centre of the labyrinth that Theseus encountered and slew the

Minotaur. In order to fulfill his mission, Theseus was obliged to enter the centre, but in

this labyrinth, the Virgin's Ring, the decision to enter the centre is a free one. This evening, I have chosen to enter and stand at the centre...

And what do I encounter at the centre of the labyrinth? What Minotaur awaits me here? I think that for some time I have had a dim picture of it lurking at the edges of my consciousness, but recently I have read two articles by Flyvbjerg⁹⁸ which helped me to lead the Minotaur out of the shadows, and I have recognized that it is indeed the Minotaur of Power.

I suppose that I have tried to avoid dealing with the possibility that power is a significant issue to be addressed in the implementation of knowledge work at The Valley Trust. And when I say "power", I am referring to a range of possible ways that power may manifest: positional power, perceived authority (or lack of it), perceived organizational priorities, the power of language, the power of education and, of course, the fact that "knowledge is power", as the old adage reminds us. Why have I avoided the issue of power? Partly it's because I had in mind a participatory approach to my research, because I wanted to make the co-creation of meaning a reality in my work and in the process minimize any negative power dynamics. I had a naïve image in mind of a group of colleagues all working passionately toward the same goal, motivated by a common desire to make the work of the organization more effective and share the learnings and knowledge which emerged from that work more widely. And I remain convinced that at one level this has been true. But I underestimated the effect of the tensions and uncertainties within an organization in transition, and what my research has revealed is that knowledge work cannot be considered in isolation from anything else that is happening in the organization - the road is made by walking through the organizational landscape in its entirety, its light and its shadow, its joy and its pain.

⁹⁸ Flyvbjerg (2000; 2004).

However, a bigger part of my reluctance to consider the power issues lies in my own makeup - I try to avoid conflict and rely instead on rational argument and logical decision making to effect change. What Flyvbjerg's paper on ideal theory and real rationality did was to highlight for me that change is unlikely to come through rational discourse and that one has to (that I have to) confront and deal with the reality of power. Of course, as an organization we know that - that's why one of The Valley Trust's themes is "power dynamics." So why didn't I realize that it would apply equally to knowledge work? Another example of my having to learn what I already know, I guess. I did bring it up at one meeting with colleagues in the Programmes Division, but I failed to follow it through.

How does this relate, then, to my growing conviction that change comes about through conversation? Perhaps what I need to realize is that conversations don't necessarily have to avoid questions of power, or that a good conversation is necessarily free of confrontation and hard questions. But then we need to be conscious of power dynamics within groups when we convene and facilitate conversations. To what extent can we minimize the negative effects of power in conversations and still retain the value of challenge? Perhaps by allowing groups to self-select so that members of the group can feel more at ease and less threatened by the power that others may bring to the conversation. But will people who feel too comfortable with each other still challenge? Perhaps I'm being too sensitive here, perhaps I'm trying too hard to anticipate the problems and smooth the road. Perhaps it's really a reflection of my own reluctance to confront and challenge colleagues. Maybe we need to stub our toes on the rocks and stumble into the potholes along the road if we're going to learn more consciously and effectively.

And Flyvbjerg's other paper, the one on power, values, and phronesis?⁹⁹ I was really struck by the way in which he brings the issue of power so consciously into organizational research.¹⁰⁰ He suggests that the concept of phronesis can be brought to bear on questions of power, and if I was starting this research again I would include questions about power along with Ramalingam's eight questions which don't really take power into account (although he does perhaps touch on this in his sixth question about vision, leadership and management). I'd try to make questions about power explicit.¹⁰¹

And what types and levels of power did I wield in my research? As I mentioned early in my thesis, I was aware of my position as a manager, and later as a senior manager, during the meetings of the CIG, and I have noted that at times I slipped into "lecture mode" when I was excited by an idea and wanted to share it. But I don't think that power was such an issue in the CIG. Where it did start to become an issue was in the establishment of results maps and activity monitoring plans, and my desire to follow these up. This seemed to introduce a tension which related to lines of accountability: to whom were colleagues in the Programmes Division accountable in terms of monitoring and evaluation activities? To their divisional managers, or to me? I can understand their concerns: it's not easy to have multiple lines of accountability, but perhaps this could have been addressed through paying more attention to job descriptions (mine in particular), and to procedures for reporting. Here I am again, thinking about the need for some type of policy or procedure to clarify the way certain aspects of knowledge work should be undertaken. But again it would need to be enabling policy and procedure, developed

⁹⁹ Flyvbjerg (2004) observes that phronesis is difficult to define, but states (p. 360) that it "...is often translated as 'prudence' or 'practical common sense'". He adds (p. 361) that "Phronesis is a sense or a tacit skill for doing the ethically practical rather than a kind of science."

¹⁰⁰ "Modern organizational inquiry can only be complete if it deals with issues of power."

¹⁰¹ Flyvbjerg offers five questions about power: "Who gains, and who loses?"; "Through what kinds of power relations?"; "What possibilities are available to change existing power relations?"; "And is it desirable to do so?"; and "What are the power relations among those who ask the questions."

in a participatory way so that it enjoys wide acceptance and application in the organization.

And what of my preference for the Western alphabetic-literate model of knowledge work that I have mentioned in my thesis? I have read in Smith's book that writing, reading, and an emphasis on Western scientific thought have very often marginalized people and cultures whose modes of knowing are different, and Smith refers to Western approaches as "colonizing knowledges."¹⁰² Has this played a part in my struggle to implement knowledge work? Have colleagues felt alienated or even marginalized by my preferences which, by virtue of my positional power, may have been perceived as the "right" ones? Have I listened enough? Would colleagues be willing to talk about this if I raised it?

And now it's dark and getting cold, so let me go in. I see that Scorpio is clearly visible, one of the few constellations that I can recognize. I keep coming back to the question: given the chance, would I go about developing the organization's knowledge work differently? A futile question, really. Playing with the shadows of time can yield fresh insights, but tomorrow I will go to work and pick up my knowledge work journey where I left off today, using those insights where I can. And although I think that I now "know" a lot more than when I started, the most important thing that I have realized is that I can only learn what I already know, and that my path of learning is both footsteps on the road and, in some strange way that is not yet clear to me, waves/wakes in the sea. I do, indeed, make the road by walking, and it's a road full of surprises; sometimes the view is breath-taking, but I also need to watch out for falling rocks! But I wouldn't have it any other way, and I remind myself that, in amongst all the excitement and stress and tension, there is a need to maintain a balance, to keep perspective. So, while walking the road (which is also the path never to be trod again)...

¹⁰² Smith (1999:chapter 3)

*Light
a fire;
boil water; make
tea. Stay
warm!*

(21st June 2009)

☪☪☪

Stake (2000:439) notes that

The case study researcher faces a strategic decision in regard to how much and how long the complexities of the case should be studied. Not everything about the case can be understood - how much needs to be?

I had intended to conclude my inquiry with events as they unfolded up to the end of 2009, portraying, as best I could, the complex and often paradoxical nature of knowledge work at The Valley Trust during a time of transition. I recognized that I would be unable to present any clear conclusion, but that had anyway not been my intention; I had set out to represent part of an ongoing process as I had experienced it. I planned my thesis as an autoethnographic writing inquiry, and as it drew to a close I had in mind to end this penultimate chapter with the short poem above. However, during the first six months of 2010 I have been surprised by the turn that events have taken. There seems to have been a remarkable upsurge of interest in knowledge work and a much closer working together of the M, E & R and the Programmes Divisions. How has this revealed itself?

Firstly, we changed our language in the M, E & R Division. We recognized that we could no longer passively wait for colleagues in the Programmes Division to approach us: if there was evaluation and research to be done in the sector, we would have to initiate it even if that meant engaging with other interested organizations. Although we did not change the wording of our divisional purpose (*to assist The Valley Trust to learn about itself and its practice, so that it becomes a more effective NPO which creates and shares knowledge so as to contribute more broadly to the health and development of individuals and*

communities), we decided that our job was not to *support* the Programmes Division, but that we wanted to *collaborate* with them where possible. In my view, this introduction of a more proactive language subtly shifted the power relationships between the two divisions onto a more equal footing: we no longer perceived ourselves to be dependent on the Programmes Division for our organizational existence, but rather we are a division of equal standing and agency. We also recognized the need to build our own capacity for evaluation and research, and have initiated a small group within the division that meets regularly to reflect on our work, discuss readings, and explore methodologies. We have debated the merits of opening this group to colleagues from the other two divisions, but decided that, for a while at least, we wanted to limit participation to staff of the M, E & R Division.

Secondly, almost as if in response to our decision that we would think of our relationship in terms of collaboration rather than support, colleagues in the Programmes Division are increasingly asking for our collaboration. I emphasize that this does not apply to all The Valley Trust's programmes, but certainly in relation to our HIV and AIDS work the level of collaboration has increased remarkably. Partly this has been due to the increasing emphasis placed by donors on monitoring and evaluation, but it goes beyond that. It seems that there is a genuine and growing interest on the part of our colleagues to hold their work up for scrutiny. For example, we have been asked to participate in the planning of two conversations which were intended, in part, to establish the views of participants about the effectiveness of our interventions. The first conversation was with male educators on the topic of substance abuse in schools, and the second was with female educators on correct and consistent condom use. Both conversations have been documented, and the condom conversation report includes the findings from a questionnaire which was completed by participants. In addition to these two conversations, Nosipho (our Senior Evaluator) has accompanied colleagues from the HIV and AIDS Communication Team to other meetings and conversations and has been able to document her observations. While I have been encouraged by these developments, we are not yet at the stage of sitting down with our colleagues in the Programmes Division to reflect on the findings and co-create meaning, but

I am confident that that will come. Why do I say this? One reason is because the initiative for greater collaboration is not coming from management, but from colleagues working in the field. They are not waiting for decisions to be taken about roles and responsibilities; they are not waiting for a formalization or institutionalization of knowledge work. They are recognizing the need to do it, and we are doing it, together. It seems to me that this is a manifestation of a growing consciousness about the importance of monitoring and evaluation, and one which I feel confident can be sustained.

There have been other examples of collaboration as well. An interesting example was the way in which one of the articles for The Valley Trust's 2010 Annual Report was written. The theme for the Report was "seeing" health and development, and explored the need to be clear about our understanding of health and development in order to see the changes which may have resulted from our interventions. The Leadership team decided that we should introduce the topic in the lead article, and then focus on our work with Traditional Leadership. I therefore recorded a conversation with colleagues in the Programmes Division, which I then developed into a draft article for checking by those colleagues who had been involved in the conversation. The resulting article was then published in the Annual Report. The importance of this was that it demonstrated the possibilities for combining our strengths to document our work, and while this particular conversation and resulting article could no doubt be developed further, I think that it was a good start.

And thirdly, I was asked by the Leadership Team to revisit my original ideas for the All Staff Meetings, the ideas which I expressed in the first draft of the knowledge work strategy but then removed after management discussed the strategy in January 2009. This has meant that we have held one All Staff Meeting, in June 2010, which followed my original proposals, on the topic of male circumcision. I invited two colleagues from the Programmes Division to join Nosipho and myself in planning the meeting, so that the process could be more participatory. The meeting was documented on video, and we debated the potentially controversial topic of male circumcision *as an organization*. We now

have a shared understanding that The Valley Trust's role is not to promote or oppose circumcision, but to present the facts as best we can and allow our clients to make up their own minds, to exercise their freedom of choice. One colleague¹⁰³ in the M, E & R Division remarked in her monthly report that

I really found the discussion on circumcision to be very interesting and I would say that this is one of the most valuable All Staff meetings that I have attended. I really think people engaged with the topic and were very open about what can be a private and sensitive issue. It was fascinating listening to different opinions, especially of men, who were very frank about the topic. I only hope that we can sustain the interest from the 2 days and create something valuable from it.

As I write this, we have another All Staff Meeting planned in August to review the work we have done during the first quarter of our current operational year, and again, I intend to facilitate the discussions from an organizational perspective.

What has prompted this shift toward a greater organizational collaboration around knowledge work? I have no easy answer to the question and indeed, I do not believe there is "an answer". As I have tried to show in this thesis, knowledge work is complex and cannot be separated from everything else that is happening in the organization. Certainly, there has been increasing pressure from donors to focus on monitoring and evaluation, but the quality of the collaboration has been such that I am convinced that it goes beyond the need for compliance. There is a warmth to the engagement that feels authentic, which leads me to believe that Block's (2002:11) three criteria for working with what matters are possible: idealism, intimacy, and depth. And so I believe that the progress which we are now making is a result of many different initiatives starting to connect in a positive and mutually reinforcing manner. I like the way that Margaret Wheatley (1999:44-45) expresses this, and offer the following quite long quote in support of what I think is happening at The Valley Trust:

¹⁰³ Here again, I have chosen not to include the name of my colleague.

In a web, the potential impact of local actions bears no relationship to their size. When we choose to act locally, we may be wanting to influence the entire system. But we work where we are, with the system we know, the one we can get our arms around. From a Newtonian perspective, our efforts often seem too small, and we doubt that our actions will make a difference. Or perhaps we hope that our small efforts will contribute incrementally to large-scale change. Step by step, system by system, we aspire to develop enough mass or force to alter the larger system.

But a quantum view explains the success of small efforts quite differently. Acting locally allows us to be inside the movement and flow of the system, participating in all those complex events occurring simultaneously. We are more likely to be sensitive to the dynamics of this system, and thus more effective. However, changes in small places also affect the global system, not through incrementalism, but because every small system participates in an unbroken wholeness. Activities in one part of the whole create effects that appear in distant places. Because of these unseen connections, there is potential value in working anywhere in the system. We never know how our small activities will affect others through the invisible fabric of our connectedness. I have learned that in this exquisitely connected world, it's never a question of "critical mass". It's always about critical connections.

Knowledge lives in relationships.

And have we been able to monitor progress in terms of the knowledge work competency matrix? I mentioned in Chapter 4 that my initial attempt to have the matrix completed by managers met with little success because it wasn't well-understood (and possibly because I was over-eager to have some form of "evidence" to convince the Board of my progress.) However, in recognition of the fact that I should have initially asked all colleagues to contribute their views, at the end of June 2010 I invited colleagues across the organization to complete the matrix. I first raised this at a management meeting, asked that it be raised at a staff meeting, and sent out the following e-mail:

Dear Colleagues,

I would like to ask for everyone's help in reviewing where The Valley Trust is in terms of its knowledge work. There are many ways that we could do this, but the one I would like everyone to consider is the attached matrix or table. It has five columns with the following headings:

- Strategy development
- Management techniques
- Collaboration mechanisms
- Knowledge sharing and learning
- Knowledge capture and storage

According to the developer of this matrix, these are five critical competencies for any organization interested in working with knowledge. However, these five competencies can exist at different levels, which are shown in the five rows from the basic level (1) to the high level (5). The level of each competency is described in its respective box; so, for example, if an organization shows a high level (level 5) of competency for "strategy development", it would be described in the matrix as *"Knowledge and learning are integral parts of the overall organizational strategy. A set of tools is available and well communicated, and the capacity to apply them is actively strengthened"*. If an organization shows a basic level (level 1) of competency for "knowledge capture and storage", it would be described in the matrix as *"Some individuals take the time to capture their lessons, but do so in a confusing variety of formats. Most don't contribute to information assets, and even fewer search them. No exit interviews or handovers take place"*.

The question I would like your help with is: **where do you see The Valley Trust in terms of the five competencies on the matrix? (How are we doing in terms of each of the competencies?)** Please print out the matrix, and indicate with one cross or tick in each column, where you think The Valley Trust is in terms of each of the five competencies (please make only one cross or tick per column). You are welcome to do this individually, or work in groups - it's up to you, but please could I ask that you write your name/names on the matrix so that I can get back to you if I have any questions. And there are no right or wrong answers - it's all about your view of where the organization is in relation to knowledge work.

Please could you let me have your responses by Friday 23rd July. Please talk to me if you have any questions or concerns - I am available on Thursday and Friday this week, then I'll be on leave for two weeks but back on Monday 19th July.

Many thanks,

Clive

Friday 23rd July came and went, and I received no responses. Some weeks later, Nosipho submitted her views, which I appreciated but which hardly represented an organizational view. So in an attempt to obtain a view broader than my own, I invited colleagues in the M, E & R Division to complete the matrix with me at a meeting in August 2010, and I was

pleased to see that our shared view is that the organization is faring quite well in terms of a number of indicators. (I present this shared view in Appendix 5.)

And so, as I contemplate the end of this phase of my research, I feel...*heartened*. Why do I choose this word? Because for me, it all comes back to two things: relationship (and the fact that knowledge lives in relationship), and consciousness. If our relationships are indeed changing for the better, becoming more authentic (and this does not necessarily mean more comfortable), then I believe that more and more colleagues will choose to make the road of knowledge work at The Valley Trust by walking it, and at the moment I see a real chance of doing that together. And I do believe that there is a growing consciousness about the need for a deeper engagement with knowledge work, not in the sense of feeling obligated or even threatened by knowledge work, but in the sense of being excited by its possibilities.

Early on my thesis I stated that one of the questions that would guide my inquiry would be: *How can The Valley Trust integrate its learning processes and its knowledge creation and sharing so as to improve its effectiveness and contribute to the broader discourse around health and development?* At that stage I had an idea that perhaps I would be able to describe with some clarity a formula for advancing knowledge work within the organization. I no longer believe that this is possible. While we now have a knowledge work strategy, M & E guidelines, results maps, regular All Staff meetings, a Quality Assurance Committee, and other processes in place, none of these can guarantee improvements and broader contributions; they can only contribute toward these goals. So can I say anything about the question that I asked: yes, but it is not what I expected. It is this: *Nurture relationships. Care for each other. Accept that there will be disagreements, but use these as opportunities to achieve a greater shared understanding. Work with people from where they are, at an appropriate pace. Build real trust. Knowledge lives in relationship. And keep the idea of knowledge work alive in people's consciousness: use a variety of opportunities to come together around knowledge work. Accept that knowledge work will ebb and flow, in*

accordance with other priorities within the organization's life. Indeed, Ramalingam (2005a:32) cautions that *"There is a clear sense that learning and knowledge can only ever be as systematic and productive as the organization itself. In other words, the overarching organizational contexts are also important."*

Knowledge work is not a discrete activity separate from the whole. Perhaps I knew that all along. But only now am I learning it.

Chapter 6: A writing story

I struggled in the beginning. I said I was going to write the truth, so help me God. And I thought I was. I found I couldn't. Nobody can write the absolute truth. (Miller, 1971:48).

Thus, one might reasonably conclude that a great many researchers have responded to the crisis of representation by taking the step to place themselves explicitly in their texts, and their texts are no longer standard articles and books. (Tierney, 2002:389).

I can only say, there we have been: but I cannot say where. (T S Eliot, 1963:191).



I opened the first chapter of my thesis with a quote from Daley and Wiebe (2002), who ask "*...why are we doing research in the first place?*", and then go on to ask another question:

"...if former ways of explaining reality have subjugated us in our world, falling short of describing relations in dynamic terms, then are we not morally obligated to search for legitimate ways of apprehending our world in closest relation to where we experience living?"

I started the first chapter with this quote because in a few lines it captures a number of issues of passionate concern to me: the need to recognize that research can be an intensely personal experience with a direct relation to one's (my) "*way of being-in-the-world*"; the nature of our (my) engagement with reality; the way in which we (I) represent that engagement with reality; and the need to seek for ways of making research "legitimate" or, to use my preferred term, to seek for ways of making research more *meaningful*. In the first few chapters I described the path by which I came to this research, and attempted to portray something of the significance of my relationship to the work that I do and the environment in which I do it. I also described the importance to me of writing this thesis in a way which would allow it to be both process and product. In this

closing chapter, I would like to come back to the process of writing, and in so doing reflect on the way in which I have engaged with a variety of creative analytic writing practices. I have called this closing chapter a "writing story" in line with one of Richardson's (2000:943) suggestions for practicing creative analytic writing, that one *"Write writing-stories, or reflexive accounts of how you happened to write pieces you have written... Writing these stories reminds us of the continual cocreation of the self and social science."*

I have for some time been fascinated not only by the idea of "knowledge creation" or, more specifically, by the co-creation of knowledge, but by the ways in which such processes are represented. In referring to the representation of knowledge co-creation, I recognize that many articles are co-authored and that, as part of that process, the researchers must routinely engage in processes of co-creation; however, it seems to me that the resulting product does not adequately represent the relational process and dynamics of knowledge co-creation. Here I am suggesting that the published results do not often hint at the struggles, the passionate engagement (assuming that it exists), or the tensions that must accompany the process. There are exceptions, of course, and here I think of the writings of Ken Gale and Jonathan Wyatt (Gale & Wyatt, 2006, 2007), wherein the voices of both authors are individually distinct. And I should also add that in referring to the usual limits to the way in which co-creation is represented, I am not confining myself to the process entered into between two or more human beings. I am rather referring to a mode of meaning-making that can be entered into between a person and, say, the natural world. Consider, for example, Buber's (1937/1987:19-21) remarkable description of contemplating a tree: after noting that one may view it as a picture, as movement, as a species, as expression of a law, as number, he concludes by saying that

The tree is no impression, no play of my imagination, no value depending on my mood; but it is bodied over against me and has to do with me, as I with it - only in a different way. Let no attempt be made to sap the strength from the meaning of the relation: relation is mutual.

The tree will have a consciousness, then, similar to our own? Of that I have no experience. But do you wish, through seeming to succeed in it with yourself, once again to disintegrate that which cannot be disintegrated? I encounter no soul or dryad of the tree, but the tree itself.

It seems to me that what Buber is describing here is the primacy of *knowing-in-relationship*, the co-creation of meaning even though one of the participants in that co-creation is not a human being. And central to this co-creation and its representation is the use of words, at least from the perspective of human participants. Perhaps the term "representation" is better written "re-presentation", because in one way, in describing or portraying an act of co-creation, one is usually attempting to present again something that has already happened, and this is challenge enough. But if what I have been attempting to grapple with in this thesis is true - that learning is an ongoing process that unfolds in relationship and that knowledge is temporary, then a writing inquiry is itself part of an ongoing learning process, and one is not so much describing something that has *already* happened, but rather something that *is happening* even as one writes about it. From this perspective, then, one is not only attempting to co-describe reality, but co-create reality through the use of words or, less frequently, through the use of non-linguistic communication.

As I try to put these ideas into words, I am painfully aware of the inadequacy of my use of language.¹⁰⁴ So let me turn again for help to the words of T S Eliot (1963) which I quoted on page 60 of this thesis: he writes about "*...the intolerable wrestle with words and meanings*" (p. 198), and points out (pp. 202-203) that

¹⁰⁴ Russell Hoban writes about the challenge of language in his book of essays, *The moment under the moment* (1992). He offers the view (p. 198) that "*What the world needs more of...is writing that tries to find out what's what by paying attention to the images that live under the picture-cards that we conventionally exchange and the images that appear beyond where we ordinarily look, the occulting glimmers under the reasonable thought and beyond the ordinary range of thought, the words that twist and moan and dance and sing behind the words that go out through our mouths, and the unknown words that we sometimes almost hear from far away, the mysteries that move us, and the patterns of the dance that lives us.*"

*...one has only learnt to get the better of words
For the thing one no longer has to say, or the way in which
One is no longer disposed to say it. And so each venture
Is a new beginning, a raid on the inarticulate
With shabby equipment always deteriorating
In the general mess of imprecision of feeling.*

And so I find myself attempting to describe what in some ways is indescribable, coming back again and again to terms such as

Process

Flow

Emergence

Unfolding

being-in-the-process of ongoing change

learning-in-relationship

I have used such terms a lot because the language of flow does not roll off the tongue as readily as the language of thing, and even the metaphors which I have used in my thesis represent a movement, a flow: dancing the dance, walking the road, following the path of the labyrinth.

And this struggle with words that I have experienced in the writing of my thesis is what The Valley Trust struggles with in describing its work: *how do we write about process in a way that allows the reader to share in the experience and to create meaning out of it?* The challenges of development work have been noted by Ramalingam (2005a) in quoting (p. 6) from the work of Ellerman (2002), who pointed out that development organizations are facing "*...perhaps the most complex and ill-defined questions confronting humankind*". And

qualitative researchers are increasingly having to confront what Denzin and Lincoln (2000) have called *"the crisis of representation"*, noting (p. 17) that this is one of three crises confronting qualitative researchers in the human disciplines (the other two are the crisis of legitimation and the crisis of praxis). Tierney has discussed the crisis of representation at some length and traced its origins in his article on *"representing reality"* (Tierney, 2002), and suggests on page 388 that *"Unfortunately (or not), the academic community has remained without a solution about how to write."* One way that researchers have attempted to address the crisis is *"...to insert not merely the use of the first person - 'I' - into the text, but also to utilize the experiences of the author as a way to make meaning"* (Tierney, 2002:389).

In opting to write my case study as an autoethnography I chose this path. Why did I want to inquire into knowledge work at The Valley Trust at all? Because I think that The Valley Trust has something to say that has not yet been said, or has not yet been said in a way that compels people to pay attention. Here I include the need to represent the work that we do in a way that not only shares the knowledge we are in the process of co-creating, but that also touches people. A fair amount of writing about health and development work is presented from a detached, "objective observer" perspective that allows readers to stand aside and not get involved - and of course there is a place for this. But there is also a place to describe the bewilderment of children who have lost parents and with them their childhood; of young girls who feel that they have no option but to succumb to the invitations of "sugar daddies" in order to survive; of the patients expected to take medications on empty stomachs; and of families, communities, and environments shattered by years of abuse. And I'm not suggesting that such representations be without substance or perspective, designed purely to tug at the hearts of people already overwhelmed by such stories. No, I'm suggesting that we are in a position to represent our work with both emotional power *and* scholarly rigour, to represent our work in a way that is both challenging and convincing, and which will require us to build our own skills at representation into an art form. Here again is the need for the both/and approach.

And I think that development NGOs in general have something to say, something about the complexity and messiness and of the near impossibility of working with the realities of the human condition, about working in a way which goes beyond measurable linear cause and effect into the realms of the invisible¹⁰⁵ and the unpredictable. In my view, that work cannot be meaningfully described in conventional "scientific" writing alone, but rather requires varied forms of writing which take both writer and reader into a different space, one which encourages and enables the co-creation of meaning.

And then, into what I believe that The Valley Trust has to say, I wanted to weave what I have to say at this stage of my life, to share a small part of what I am learning. In her thought-provoking article, "*Becoming writing, becoming writers*", Colyar (2008:429) quotes Sartre (1974) as saying that "*self-connection is the fundamental purpose of writing*"

...because everyone has a need to be meaningful - to signify what they experience. Otherwise it all slips away...every single person feels, perhaps only unconsciously, the need to be a witness of his time, of his life - before the eyes of all, to be a witness to himself.

✪✪

And so I have tried to write a thesis that attempts to transgress the conventional, one that is perhaps more open and honest, that (in my view) takes a few more risks than much of the published writing about learning and knowledge creation. I wanted to insert my own voice, not as a "*...movement...toward a more cathartic psychological agency of the self*" (Tierney, 2002:392), but in a reflexive way that doesn't shy away from the difficulties and related emotions which have played such a big part in the way in which my work has unfolded. But in addition to introducing my own voice, I wanted the voices of others, my colleagues, to be clearly heard. In this I feel that I have been only partially successful. The voices of my colleagues came through clearly in the third chapter, in which I portrayed the work of the Cooperative Inquiry Group, but they faded into silence in the fourth

¹⁰⁵ In their 1998/89 Annual Report, the Community Development Resource Association refers to development practitioners as "*Artists of the invisible.*"

chapter when I touched on some of the difficulties of boundaries, lines of accountability, and power in the development of knowledge work in the organization. Although this was disappointing, it was understandable; researching one's own organization is fraught with challenges, and in relation to this, Jarvis (1999:98) warns that

Ethical issues also arise because practitioner-researchers are dealing with their colleagues and clients as practitioners. Should they, in the researcher role, use their colleagues or clients as subjects for research?

I had hoped to avoid this dilemma by taking a cooperative approach to my research but this, too, was only partly successful. Although I attempted at all stages to share my writings, there was limited response. Nevertheless, I hope that where I have not been able to quote colleagues directly, I have been able to incorporate something of the insights which arose out of our engagement, or perhaps better said, out of our relationship.

I also wanted to create a thesis that is aesthetically pleasing, and therefore drew heavily on arts-based methods not only to re-present what I have been learning, but also as a way of learning. So the photographs and drawings are included not only as illustrations of events and processes, but in an attempt to allow readers to share something of the process of meaning-making itself. Obviously, the photographs and drawings which I have included come with the meanings which I (sometimes in collaboration with others) have attached to them, but hopefully this will not discourage readers from engaging with them afresh to explore meanings relevant to themselves.

And then, I wanted to explore the use of words and images to inquire into a rich variety of processes, events, thoughts, emotions, and meanings. I wanted to play with words and images in an attempt to share what is sometimes difficult to express, to coax into being what might otherwise remain unsaid, to venture into spaces which are sometimes glossed over in conventional reporting. In so doing, I intentionally wanted to avoid drawing firm conclusions and concluding my inquiry with some form of neat closure; I have already referred to the work of Pigrum and Stables (2005), that "*...work toward the finished work*

but also the work that is in opposition to the closure of the completed work." Pullen and Rhodes (2008), too, have written in support of texts that are "...open-ended, incomplete, and uncertain", texts that defy the "...utopian pursuit of conceptual clarity, linear argument and knock-down conclusions." I find myself coming back to this idea of messiness, boundary crossing, open-endedness, and transgression again and again; I acknowledge that this attachment is deeply personal, and I believe that it arises at least in part from my 26 years of engagement with health and development work, and my growing conviction that one cannot (that I cannot) adequately express or represent the messiness of that work in conventional ways. ("You say I am repeating something I have said before. I shall say it again. Shall I say it again?" ...T S Eliot (1963:201) - again). Indeed, I no longer believe that an organization exists as a neatly-packaged, clearly bounded entity which can be easily described, except perhaps in tentative terms as a snapshot, a *vignette*, a case study, a poem; as Pullen and Rhodes (2008:246) observe, "*Organization is never present, never whole, never really accounted for and never stable.*" In short, creative approaches to writing have become an expression of the research paradigm¹⁰⁶ which I hold dear, one which Lincoln and Denzin (2000:1052) describe as

...a form of qualitative inquiry in the 21st century that is simultaneously minimal, existential, autoethnographic, vulnerable, performative, and critical. This form of inquiry erases traditional distinctions among epistemology, ethics, and aesthetics; nothing is value-free. It seeks to ground the self in a sense of the sacred, to connect the ethical, respectful self dialogically to nature and the worldly environment.

Did I succeed? It's hard for me to say, and each of my readers will have their own thoughts about that. I tried to remain conscious of Richardson's (2000:937) criteria for creative analytic practices, although with reference to criteria I find myself increasingly

¹⁰⁶ Yvonna Lincoln (2010:7) notes that "*Paradigms and metaphysics do matter. They matter because they tell us something important about researcher standpoint. They tell us something about the researcher's proposed relationship to the Other(s). They tell us something about what the researcher thinks counts as knowledge, and who can deliver the most valuable slice of this knowledge. They tell us how the researcher intends to take account of multiple conflicting and contradictory values she will encounter.*"

agreeing with Neilsen's (2001:263) view that *"We suffer from hardening of the categories in the research enterprise."* So in the end I hope that my thesis will be viewed as a whole rather than analyzed in terms of its parts. Wholeness is important to me; I wrote about it extensively in my Master of Commerce dissertation, and now it finds its way into the closing lines of my thesis. I have mentioned earlier that the work of NGOs is messy, complex, and unpredictable. Now I want to say that I think it is also about healing, and as such, I believe that any research conducted by NGOs, as well as the representation of that research, should also be about healing. "Healing" is open to many interpretations and meanings, and I do not want to say more about that now, but would like to offer a quote from Peter Reason (1998a:44), whose work and writing has so inspired me over the past few years:

To heal means to make whole. We can only understand our world as a whole if we are part of it. As soon as we attempt to stand outside, we divide and separate. Making whole necessarily implies participation. One important characteristic of a participatory world-view is that the individual person is restored to the circle of community and the human community to the context of the natural world. To make whole also means to make holy. In a participatory world-view meaning and mystery are restored to human experience. The world is once again experienced as a sacred place.

✪

It is tempting to close my thesis by asking: *What lies around the next bend in the road for knowledge work at The Valley Trust?* But of course, that question would be meaningless in the context of Machado's poem, which has been so influential for my own meaning-making processes during my research: if, as I believe, we make the road by walking, then the next bend in the road isn't there to be discovered or predicted, but rather to be created. I briefly described, at the end of Chapter 5, the good progress which I think that The Valley Trust has made with knowledge work during 2010, and I will strive to nurture the growing interest in, and commitment to, knowledge work within the organization. But like many NGOs, The Valley Trust is feeling the effects of the ongoing economic downturn, and

questions about financial sustainability inevitably form an ongoing part of our organizational conversations. I know that the whole organizational landscape influences the way in which knowledge work is performed, and I accept that the road ahead will not be without its conflicting priorities and detours. But these are part of the knowledge work reality, and we have to grapple with them as best we can. Glen summed this up so well in her response in May 2007 to my first writing (Appendix 3:237), when she observed that

The Facilitator Development Programme, action learning groups, writing, the CIG! These are the key initiatives in our context of practice development, capacity development, and above all, to organizational integrity (coherence). Yet more and more I hear these being regrettably questioned, which I summarize in a paraphrase that synthesizes what is being said: Can I afford to remain with these processes? In the final analysis, I will be appraised on the things I am being specifically PAID to do in programmes, projects and management. I have to find a way to protect my survival so that I am still standing and able to achieve my bottom line responsibilities, which on their own are too much to accomplish. I can not afford to participate in anything else.

Yet how can we *not* participate in these activities? Again, the choices are not "either-or" but "both-and", and we need to understand them as such. So let me put aside the question, and rather offer one more print as sustenance for the journey...



"The next bend in the road."

Monotype. (Clive Bruzas, 25th April 2009)

Appendix 1

A record of my attempts to obtain permission to include two pieces of music in the electronic version of my thesis.

On page 2 of this thesis, I noted that I found that the abrupt changes in Shostakovich's string quartet no. 10 in A flat major evoked a similar of sense of unpredictable movement as some of the sudden shifts that I have experienced in what I thought I "knew". I therefore wanted to include this piece of music in the electronic version of my thesis to allow the reader to experience something of what I was attempting to describe. Later in the thesis (page 106), I referred to a tango by Piazzolla in connection to "the dance", and wanted to include a recording of this piece of music to allow the reader to experience the slow to and fro movement of the music. However, I was concerned that copying these two pieces of music, even for academic purposes, might infringe copyrights. The recordings I own are on the Naxos label (the Shostakovich string quartet) and the Wagram Music label (the Piazzolla tango), so I attempted to obtain permission from these labels to include the music by sending the following e-mails:

Dear Naxos Music,

I am a part-time PhD student at the University of KwaZulu-Natal, South Africa. I am researching knowledge creation and sharing in the NGO for which I work, The Valley Trust (for more information, please see our website <http://thevalleytrust.org.za>). As part of my research I have referred to Shostakovich's string quartet in A flat major, Op. 118 as a musical metaphor: for me it is an unsettling piece of music which perfectly illustrates the feeling I get when what I think I know is seriously challenged. I would like readers of my thesis to hear this piece of music (which I have on the Naxos CD "Dmitry Shostakovich, String Quartets Complete"), so that they too can explore the emotion which this music helps to create. For the digital version of my thesis, I would like to include a copy of this track. I emphasize that the use of this track would be purely for academic purposes, with no economic implications. I therefore request permission to copy this one track (23:28 minutes) onto the digital version of my thesis (ie. the DVDs which would be included with each hard copy). I would, of course, acknowledge Naxos Music for permission to use the track as part of my thesis.

Dear Wagram Music,

I am a part-time PhD student at the University of KwaZulu-Natal, South Africa. I am researching knowledge creation and sharing in the NGO for which I work, The Valley Trust (for more information, please see our website <http://thevalleytrust.org.za>). As part of my research I have used the metaphor of the tango to describe the way in which people engage with each other to share

knowledge, and to familiarize myself with the tango, I purchased a copy of the 2 CD set, "The best of Astor Piazzolla" (WAG 851 - 3124022). For the digital version of my thesis, I would like to include a copy of the track "Solitude" (track 2, CD 2), so that the reader can gain a sense of the rhythm of the tango and better understand why I have used this metaphor. I emphasize that the use of this track would be purely for academic purposes, with no economic implications. I therefore request permission to copy this one track onto the digital version of my thesis (ie. the DVDs which would be included with each hard copy). I would, of course, acknowledge Wagram Music for permission to use the track as part of the thesis.

Naxos responded positively in the following e-mail:

Hi Clive,

*I just saw your email from our customer service.
I don't see a major problem with this request....*

*Could you tell me which NAXOS CD this track is from?
What is the Naxos Catalog Number?*

Best Regards

However, they later wrote to say that

Only minor problem, is that Dmitry Shostakovich passed away in 1975...meaning his music is still in copyright. We can only authorize use of our Master Recording...but...the Composition, we cannot. You'd have to get permission from the Copyright Owner / Publisher. Sorry about that.

Wagram Music did not respond.

I therefore attempted to track down the copyright holders, and after a few inquiries was advised to contact the University of KwaZulu-Natal's Copyright Office, who responded as follows:

I have spoken to my supervisor as per email below and she advised that you need to get permission for using the songs from the following:

Shostakovich's string quartet no 10, you need to contact "Accent"

And Solitude you need to contact "Gallo"

Kind regards.

I duly e-mailed Accent and Gallo, but received no response.

I then approached Joyce Myeza, Campus Librarian at the University of KwaZulu-Natal's Durban Campus Library, who put me in touch with Pat Liebetrau of Digital Innovation South Africa at the University of KwaZulu-Natal (DISA) (<http://www.disa.ukzn.ac.za>) at the University of KwaZulu-Natal. Pat shared with me her opinion about using music in the following e-mail:

Hello Clive

Thanks for your e-mail - I have done some research and spoken to our copyright person and I can respond as follows...

I am not able to give you a definitive answer (I don't think there are any available at present) but I can make suggestions based on our experience in building online digital collections.

- 1. Based on the Naxos authorisation for the use of their Master Recoding it seems that you could go ahead and use that track with appropriate credits.*
- 2. You could use extracts of the music on the basis of the provision in the Copyright Act of "fair use"*
- 3. On the basis of use for **educational purposes** and **no economic gain**, and providing proof of **best efforts** in trying to get permissions ie include all letters and e-mail correspondence as appendices, you could go ahead and include the tracks as part of your thesis*
- 4. Piazzolla has some music available for free download from the website at <http://www.piazzolla.org> - providing a precedent.*

My feeling is that on the basis of No 3 above, indicating best efforts to acquire permissions, you should be ok to include the tracks on a supplementary CD.

*Kind regards
Pat Liebetrau*

Having read Pat's opinion, I decided to go ahead and include the two pieces of music in the electronic version of my thesis, but I emphasize that the decision to do so was mine alone, and any infringements of copyright are therefore solely my responsibility. Should anyone reading my thesis have any other views on the matter of copying music for academic

purposes, or who feels that my use of the music has been unfair and/or infringes copyright, I would be keen to hear from them and will make every attempt to replace the existing electronic versions with versions from which the music has been removed.

Appendix 2

The Valley Trust's guiding statements.
The Valley Trust Annual Report, 2009:1

The Valley Trust's Guiding Statements

The Valley Trust is a centre for health promotion, founded in 1953 in the Valley of a Thousand Hills in KwaZulu-Natal, but now working throughout the province.

Our vision is communities in which people take responsibility for improving their own health and quality of life within a democratic society.

What do we do?

We enable people to initiate and sustain their own developmental change processes.

How do we do it?

We design and engage in integrated processes with people, aimed at bringing about developmental change at the individual, organizational, and whole systems levels. These processes include:

- Facilitation
- Supportive training
- The creation and maintenance of partnerships
- Action learning and action research
- Lobbying and advocacy
- Sharing our learnings through documentation and presentations in various forms
- Developing models of relevant and appropriate practice

Our work is based on the belief that:

- All people have potential
- All people have choices
- All people have equal rights
- Good health and sustainable development require positive interactions between people and their environments

Our objectives:

1. To positively influence people's views of their own self-worth;
2. To increase people's awareness and understanding of opportunities for improved quality of life;
3. To improve the way in which different sectors collaborate;
4. To influence the systems which impact on people's health and quality of life.

Our core values:

Integrity; Human dignity; Proactivity; Enablement; Sustainability.

Appendix 3

My first piece of reflective writing that was circulated to members of the Cooperative Inquiry Group for their comments (which are included here.)

"Learning, knowledge creation, and knowledge sharing at The Valley Trust - a case study".

First reflection: 18th May 2007

Clive Bruzas¹⁰⁷

Friday, 18th May 2007: 08h15. Let me start the working day with a piece of timed writing - a "flow of consciousness" piece. I'm supposed to be attending a meeting with [a colleague] and Khantsho in a few minutes to talk about youth programmes. [The colleague] said she would send me some documentation, part of the work in progress, so that I could prepare for the meeting, but so far I've received nothing, so I don't want to go into this meeting unprepared and waste time talking about something I don't know much about. And then after lunch there's another meeting, for managers to discuss the report which [another colleague] wrote after his trip to Ethiopia, but again the document hasn't been circulated so I don't know what we're going to discuss. I can't even remember who was asked to circulate his report, which I know he wrote some time ago. So maybe I won't go to that meeting either. And at the April managers' meeting we agreed that we could improve the quality of our focus group work, so I offered to run a day's training for colleagues who facilitate focus group interviews - managers were asked to let me have a list of who would attend, but it's now a month later and I've heard nothing. And now this month's managers' meeting has been cancelled so there won't really be a chance to follow up until June. And then Glen has been too busy this week to sit down and tell me about her week at the Community Development Resource Association Biennial in McGregor, and so it goes on. Margaret Wheatley said that "We have to slow down - nothing will change for the better until we do." And I'm asking myself where does the knowledge work fit into this crazy merry-go-round? How can we really do any meaningful knowledge work until we slow down?... (10 minutes)¹⁰⁸

I have struggled to make a start on this writing process, this "*writing as inquiry*" (Richardson, 2000:923-924). I have been looking for the "right" entry point, but I'm realizing that there are multiple entry points and that as the writing progresses those

¹⁰⁷ I circulated this document electronically and invited input, in an attempt to incorporate other voices from the cooperative inquiry group; now that I have them, I am struggling to bring them into the text in a way that doesn't interrupt the flow of reading. Some I have incorporated as footnotes, others within the text itself, and still others as endnotes.

¹⁰⁸ Comment from Liz Green: "Clive, I enjoyed this introduction as an honest reflection." However, Claudia reminded that me I am equally guilty of not responding to requests: "I do sympathize with your frustration about not receiving promised documents. I think I am still waiting for an article for the website about FDP.....?"

entry points will each take their rightful turn, and that the connections between them will become clear. As the Head of Orpheus says in Russell Hoban's "The Medusa frequency" (1987:39): *"My story is not a sequence of events like knots on a string...all of it happens at once and it goes on happening; all of it is happening now and any part of it contains the whole of it, the pictures needn't be looked at in any particular order."* I'd also been hoping that my "voice" would be present from the start, but then I take a deep breath and remember that Richardson has pointed out that *"There is no such thing as 'getting it right' - only 'getting it' differently countoured and nuanced"* (Richardson, 2000:930-931).

So, to get back to the busi(y)ness of The Valley Trust and the difficulties which it presents to this research: although I knew that the research process was going to be a difficult one, still I am finding the challenges associated with the cooperative inquiry group process to be quite frustrating. Peter Reason (1998b) cautions that *"...cooperative researchers need to learn not only to manage their own processes, but to manage the collective distress of their institutions."* Is our busyness part of the "collective distress" of our organization? It seems like it to me. In trying to coordinate the inquiry group meetings, I've received e-mails such as the following:

Hi Clive, I understand your need to keep the pot boiling, but March, April and May have become overwhelmingly hectic for me, so putting in two days just at this time will be difficult while I am trying to give some time to preparing for FDP. If you feel it is really important to do so, I will try to work round it. (Glen).

Morning everyone, Sorry to respond so late. I can't make next Friday as I have just learnt that I have to attend at varsity from Tuesday next week until Friday. The 26th should be fine for me. (Lungi).

Hi, I am on leave on the 13th but can make afternoon of 26th. (Our colleague).

In spite of these difficulties, we have held three meetings so far: on 9th March; 13th April; and 26th April. (And Liz adds: *"Here I need to make my unpopular comment: There is almost always time for things I (or we) really want to do..."*) The "we" are myself (Manager: Organizational Development); Glen Jager (OD Facilitator in the OD Department); Lungile Mchunu (Researcher in the OD Department); Gugu Shezi (from Whole School Development); Khantsho Kolisang (Manager: Conference and Leadership Centre); Liz Green (Manager: Finance and Administration); and Jabu Mngadi (Manager: Human Resources in Finance and Administration). So, four departments are participating directly in the process so far. I say "directly" because I have been copying all communications to our colleague, and Tuki Maseatile, our Executive Director. Both our colleague and Tuki had expressed interest when I first proposed the idea of a cooperative inquiry group at a managers' meeting on 22nd March, but neither has attended any of the meetings or communicated about the process in any other way. I did receive an inquiry from Claudia Ringewaldt in Information Management, who had heard about the group and was keen to join; I sent her the readings and was looking forward to her participation at the next meeting on 24th May, but then received the following e-mail from her on 7th May:

Hi Clive,

Thanks – however I have bad news. I am suddenly booked to go up north for NDA¹⁰⁹ interviews from 23-25 May 07 so unfortunately I won't be able to make it. The timing for the NDA project is rather tight ... suddenly ... this was most certainly the most significant change in my day/life today! I'll have a look at the article anyway.

Lungile observed in her monthly report that

Knowledge management, like most of the forums at TVT, seems like it is composed of OD staffers, I think this is becoming a trend and I don't understand why. Nonetheless, we have formed a Cooperative Inquiry group. I feel this group was created for open conversation which I think is needed for growth. I say this knowing fully that this group is composed of different individuals who might not necessarily feel the same way I do due to their experiences and exposures.

In my research proposal I indicated that I would seek representation from all departments in an attempt to coordinate an organization-wide process, but I would prefer participation to be voluntary and, dare I say it, passionate. Nevertheless, I am concerned that we are exploring an organizational issue with less than half the departments present¹¹⁰. I am especially concerned about the absence of anyone from Information Management, but hopefully that will change if Claudia manages to fit group meetings into her diary.

The absence of more than half our departments raises important questions for me. The first is: "Do most departments not recognize the importance of knowledge work?" (*Is it just my passion? Is it perceived as "Clive's thing", in the same way that I think environmental work was viewed in the past?*) Or is it just, as Ramalingam (2005:28) notes, that "*The most common reason given by core staff members for not applying knowledge and learning tools is a lack of time to do so.*" This relates to the frustrations which I described in the introductory paragraph to this reflection, but Ramalingam goes on to state that "*This difficulty is heightened by a cynicism amongst core staff members across almost all the organisations that knowledge and learning is tantamount to a 'solution looking for a problem'*" (Ramalingam, 2005b:19). I like to think that this reason does not apply to The Valley Trust.¹¹¹

¹⁰⁹ At the time, The Valley Trust was facilitating a capacity-building programme for selected Community Based Organizations (CBOs). The work was funded by the National Development Agency (NDA).

¹¹⁰ The departments which have not participated so far are: Community Based Health (the biggest department in terms of staff numbers); Integrated Technology (colleagues who work a lot with indigenous knowledge systems); Information Management (colleagues who undertake most of our quantitative surveys through questionnaire and database design, data "capture", data analysis, statistics, and mapping); Advocacy (two colleagues who would hopefully play a significant role in terms of using organizational knowledge to influence health-determining systems); and of course the Executive Director's office.

¹¹¹ Liz comments on the time issue: "*Is there really no time across the board, or is our time management and prioritization the underlying reason?*" She also indicates that in her view, the



The figure of eight diagram in current use at The Valley Trust.

The second question is: "If this cooperative inquiry process is located within an action research framework, what are the possibilities of the group bringing about any significant and sustainable change in the way that The Valley Trust works with knowledge?"

There are two parts to this: one relates to the absence of half the departments, and the other to the "power" or authority of the group. (I don't like the words "power" and "authority" in this context, but they will have to do for the moment). It seems to me that the KM group can settle into a comfortable routine of monthly meetings to discuss matters relating to knowledge creation and sharing, and increasingly we can base these discussions around our practice and hopefully those of us who are participating will find our practice changing. But this won't necessarily influence the broader organization, represented by the centre point of the lemniscate diagram (left) that I keep coming back to. There are other

questions as well, but I'll get to those later...

(Liz comments: "Yes there is a power dynamic and yes I think this could be reviewed as part of the Management Committee agenda. I would like to think that the organization will be influenced and I was encouraged in this by the attendance on 24 May.")

What have we been doing as a cooperative inquiry group? At the first meeting on 9th March, I outlined my research and introduced the idea of a cooperative inquiry group, using Reason and Heron's (1999) guidelines. I also introduced the "knowledge pyramid" (Rowley, 2007:164) as a way of thinking about data, information, and knowledge, especially in relation to our work at The Valley Trust. At the second meeting on 13th April we touched on the role of the group, and I brought up a comment that Tuki had made about a "tension" between the OD Department and Information Management Department - I'm still not clear about what he meant, but there does at times seem to be an unspoken...*something*. (Liz suggested we ask Tuki about this, as she sensed that it is more than the obvious qualitative

question of time for knowledge work at The Valley trust does not reflect a rejection of its importance.

- quantitative divide). The conversation also touched on some of the language that is used in knowledge management, often relating to the technological dimensions of KM (what one colleague referred to as the "hi-tech stuff".) Glen suggested that there is a "bandwagon" aspect to the KM language, and Liz mentioned that she had found Hildreth and Kimble's (2002) article helpful in coming to grips with some of the terminology. We agreed that I would circulate one or two articles which I had found helpful, so the next day I sent the Hildreth and Kimble article out electronically, and photocopied Snowden's (2002) article on "Complex acts of knowing," and Zeleny's (1996) article on "Knowledge as coordination for action." During the conversation, Khantsho also raised the question of indigenous knowledge, and where it "lives." At the time, I made a note in my journal that "knowledge lives in relationship," and now I must add something that I have been reading recently: von Krogh (1998:134) asks how managers make knowledge creation work in practice (my question about the "authority" of the group?) He states that *"The challenge is intimidating, because knowledge is so intimately bound up with people"* and goes on to suggest that *"Success with 'managing knowledge' will therefore ultimately depend on a manager's sensitivity to people issues."* von Krogh goes on to mention (p. 136) the importance of creating enabling conditions for knowledge creation to happen, and observes that *"...in our search for enabling conditions, we have found values guiding relationships in organizations to be of particular importance, and the value of care in organizational relationships is one key enabling condition."* DiBella (2005:145), too, emphasizes the "people aspect", and states that

The presumptions we carry about people, places, and things guide our expectations and actions; and the words we use to label, characterize, or describe our world embed or reflect what those presumptions are.... The labels we give to our constructs carry with them meanings and assumptions that, although usually unstated, guide our hypothesis-making and testing, and the actions of those who apply our theories.

(So what *is* this tension between OD and Information Management all about...?). Liz observes that *"From observing the interaction on 24 May, it seems to me that it is more than the 'what' but also the 'how' and the 'why'."*

At the third meeting on 26th April, we discussed a working paper that Lungile had prepared and circulated, describing some aspects of focus group interviews which she has been doing as part of our involvement as researchers in a Peer Education programme on contract to the Department of Education. In her paper, she focused on her personal responses to what she has been hearing from learners in the schools where she has been conducting the focus groups; for example

My first reaction to what is happening in schools was that of horrific shock. I felt like screaming and saying "This shouldn't be happening, not at this early age and not in this day and age". The truth is it is happening. I felt like the girls and boys as well in schools are in this fast moving train that is heading straight for the wall. I remember coming back from the schools feeling absolutely tired and sometimes ashamed that I cannot do anything to stop or change the situation. I felt like my work was unearthing horrible realities and doing nothing to change or to assist in the process of changing what I have discovered. This is not a good feeling to have hanging over you.

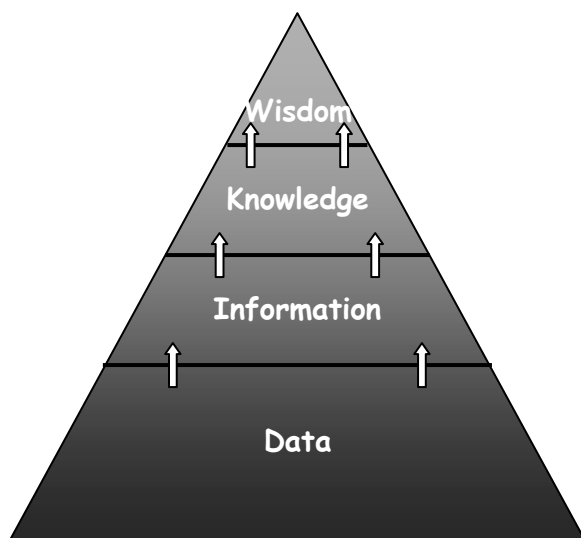
I found the KM group discussion very helpful as a way of starting to understand the way we work with knowledge as an organization. I think that Lungile did, too: in her monthly report for April, she noted that

In a way, this group has critiqued one of the programmes that I am involved in and in turn I am critiquing the programme. This has raised a lot of questions in my mind about the intention and the way that this programme has been carried out. Most importantly for me is the issue of knowledge; from what I know, encounter everyday, unearth from time to time; what qualifies as knowledge? Who's to say what knowledge is or not! Below are some of the questions that I started playing with as I was preparing for our last meeting in April:

- *Does certain behaviour make us 'know' things?*
- *Where does knowledge come from?*
- *How is knowledge formed?*
- *How can knowledge be formed/constructed and seen by other people.*

What seemed to be emerging during the discussion is that Lungile, with one or two other colleagues, goes into selected schools to conduct focus group interviews around the topic of HIV and AIDS, sexuality, and Life Orientation classes. The recordings are then transcribed by the interviewers, in the process translating from isiZulu into English. As Lungile observed at our group meeting

And then after that, well, I just listen through it now, go over it again, then I start typing up a transcript which, on its own, is quite tricky 'cause they are conducted in isiZulu, so then when I produce a transcript it has to be English because Valley Trust works in English, so I might not, I might not be interpreting the experience or the thoughts of the learners, or the stakeholders, correctly, that's one thing I might not be doing (pause)... 'cause they might mean one thing and I might be saying the other. (Transcript of the Cooperative Inquiry Group meeting, 26th April 2007).



The knowledge management pyramid, adapted by Clive Bruzas from Rowley (2007:164)

So already, at this point in the process, something may well have been "lost in translation". The transcripts are then given to colleagues in Information Management to analyze, and the results and recommendations sent to [name], the organization which will be planning and implementing the Peer Education programme in participating schools. At the meeting we used the KM pyramid to try to understand the knowledge "flow" in this programme, from qualitative data to information to knowledge and who was involved, and as we looked at it, what is happening in this programme appeared increasingly disjointed - the flow broken. Reason (1998a) advocates for the *co-creation* of meaning, and it seems to me that the "system" which is in place to

"understand" the views of learners as the basis for developing an intervention programme is a far cry from co-creating anything, except perhaps misunderstandings and confusion.

I felt quite satisfied after the meeting. I felt that we had had a focus, that our conversation had been practice-based, and that the KM pyramid had been helpful in thinking about some aspects of our knowledge work. However, my unquestioning use of the KM pyramid has been shaken by two readings which I have been engaging with since the meeting. The first is a book by Henri Bortoft (1996), the second an article by Ilkka Tuomi (2000). It now seems to me that the pyramid, while definitely having its uses, can promote a reductionist understanding of process. In creating knowledge, we don't consciously separate the process into logical steps, mentally saying to ourselves "Right - these bits here are *data*, but now I'm contextualizing them into *information*, and once I've pondered their *meaning* I'll know what's going on!" Bortoft points out (p. 144) that

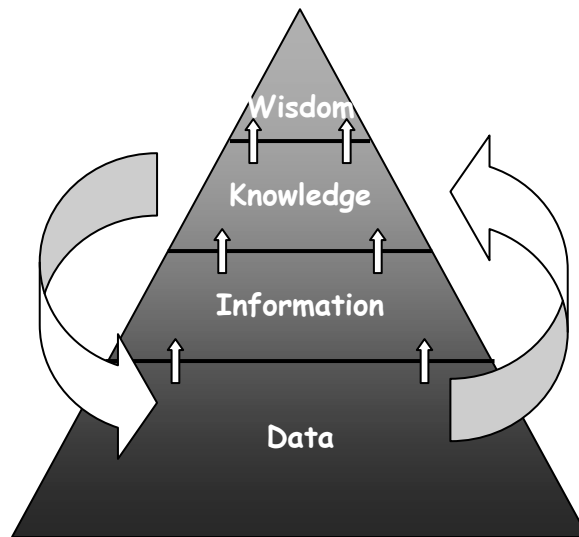
... there is more to seeing than meets the eye, and the extra factor is the action of the organizing idea. Without this we cannot see what is there. However, we must not think of something which is seen for the first time as if it were there already as such, i.e., as if it had already become visible but simply was not being seen. Seeing it for the first time, 'there's it,' so that it becomes visible. This means that it comes into the realm of the visible from the invisible, so that it appears and thus comes to be as such. The failure to notice the dimension of mind which is intrinsic to observation leads directly to the most popular misunderstanding of scientific knowledge, namely, naïve empiricism - which could also be called 'factism'. This is the view that there are 'facts,' which are independent of any ideational element and to which we have direct access by sense perception. Such facts, it is believed, constitute the basic data ("the given") of science. The scientific procedure, according to this view, is to begin by collecting such facts by 'pure observation' (i.e., idea-less observation). Only then, when the facts are known independently of any ideas, does thinking begin.

What I understand Bortoft to be saying is that knowledge creation is not a neat step-wise process that we can divide into parts (and allocate to different people or departments as part of a contract), but a "whole" process, akin to Peter Reason's "co-creation of meaning." And then Tuomi states that

(Given the discussion above), it should not be difficult to recognize that the hierarchy of data-information-knowledge should be turned the other way around. Data emerges last - only after there is knowledge and information available. There are no 'isolated pieces of simple facts' unless someone has created them using his or her knowledge. Data can emerge only if a meaning structure, or semantics, is first fixed and then used to represent information.

So it seems to me that if the KM pyramid is to be useful, it needs to be represented somewhat differently, perhaps as follows to indicate the constant flow, the "wholeness of process":

Or perhaps the little arrows need to point in both directions, all the time, the flow never breaking...¹¹²



The knowledge management pyramid,
adapted by Clive Bruzas from Rowley
(2007:164)

80 08

As I mentioned earlier, other questions have also arisen as this research journey deepens. For example:

1. What is my role in the cooperative inquiry group, and how is it perceived? Holian (1999) has described some of the difficulties of doing research within one's own organization. Amongst other issues, Holian notes that

The role of the researcher as an outsider or insider can vary with different research methods, ranging from that of an impartial objective observer, through observing while participating, to being a fully participating observer....My involvement in the research project was overt, identified in addition to my organizational role to organizational members, and some ethical issues arose as a result of conflicts between my role as a researcher and my organizational role.

At the moment I am both researcher and facilitator, and at the same time a manager with certain responsibilities and co-responsibilities within the organization. At the moment it is probably my coordination that is "holding" the group together. Will a time come when there is a "co-ownership" of the group?

2. How can we better understand where each group member is "coming from" in terms of their understanding and practice of the process of knowledge creation?

¹¹² Liz notes that "Ilkka Tuomi's paper was very interesting in terms of the flow. It resonated for me with something our colleague said on 24 May regarding 'only being able to ask questions about something you already know about'."

3. Where am *I* coming from? What colours *my* knowledge creation process?¹¹³ Richardson (2000) recommends the use of "working metaphors": "*Consider a part of your life outside of or before academia with which you have deeply resonated. Use that resonance as a working metaphor for understanding and reporting your research.... Writing from that which resonates with your life nurtures a more integrated life.*" I'm thinking that what resonates most with me is what I can only call the "world of nature", and perhaps I need to look to that as a working metaphor for understanding my own knowledge creating processes.
4. How can I use artistic methods to better understand and represent this research process? While returning from a meeting with my research supervisors on 26th March, I was thinking about knowledge and how, according to Hildreth and Kimble (2002) it can be both "hard" and "soft", how to me it's the flow that's important; for some reason the idea of working with wax came to me, so I've been exploring the use of wax as an artistic medium, and I've learned that it has been used for many years in a process called "encaustic painting."¹¹⁴ So this is something else to explore.



And in closing, let me come back to where I started this reflection (I can't resist a quote from T S Eliot here):

*And the end of all our exploring
Will be to arrive where we started
And know the place for the first time*

As I mentioned at the start of this "report", I had hoped to write something a bit different, but I am starting to realize what a difficult task I have set myself with this research: the use of writing inquiry, particularly autoethnography, as both a means of inquiry and the representation of that inquiry. I have avoided saying too much about my feelings in this reflection, (although I have touched on some of the frustrations). But the importance of maintaining and nurturing relationships is central to this work, and how do I honestly represent some of my thoughts and feelings without offending or alienating some colleagues. Knowledge creation requires caring for relationships, says von Krogh (1998), yet the autoethnographic approach seems to require a level of honesty that has the possibility of damaging relationships, or at least, of taking them in a different direction. (And as Liz points out: "*The maturity of the relationships will I think make a difference.*") A paradox indeed, and one that needs a lot of careful thought.

¹¹³ Liz suggests that "*Perhaps this is a question each of us should answer. It may enhance the sense of ownership of this process.*"

¹¹⁴ Encaustic painting involves the use of wax as a medium, and I was briefly interested in this method because, like knowledge, wax can be both thing and flow.

And a comment from Liz to close: *"Ontology and epistemology keep coming to mind as I reflect on this process, and I would like to explore these aspects further as we continue this journey if you feel it would be appropriate."*



I circulated this writing to members of the CIG, and Glen responded on 30 May 2007

as follows:

To Clive:

Oh-my-goshy-gosh, Clive, what a challenging situation you have got your self into for your PhD research, but how creative and meaningful it will be, even if the CIG falters and wavers along on the wisp of a thread! Your questions have really got me thinking. As I read your reflections, the enormity of the situation hit me full force with what felt like a thunderbolt, between the eyes. But what it was that affected me that way, was that for the first time I really engaged with the situation from your perspective: of having to deliver in terms of the demands and deadlines of an academic study.; of how you are so dependent on others. Your context is an organization in a process of unresolved transition which is reflected at so many different levels that affect all in it. How free are we to make choices in this context?

Clive's question, *"is our busyness part of the "collective distress" of our organization?"* in my view epitomizes this situation and reminds me that Kaplan (1999), has referred to **anarchy** in his description of the development process.

*Development is non-linear, therefore unpredictable and even **anarchic**; at the same time, there appear to be natural phases, sequences and modalities which can be said to characterize the process as a particular pattern or arrangement.*

With this freshly in my mind, my questions are possibly even scarier than Clive's:

- *Is this situation an early sign of the anarchy of an organization in developmental transition?*
- *Without time to, and capacity for collective thinking and reflection, can we even begin to hope for developmental transformation, or will we have to settle for reformation that may perhaps take us way back into our history development as service and resource delivery and to project management? Perhaps that would be possible to do with excellence? But is it consistent with our vision? Do we really want to change our vision?*

I feel convinced of this connection between the *busyness* and the *"collective distress" of our organization?* Tuki identified this while still in the induction period, when he indicated his intention of doing something about it. But now that he is in the drivers' seat he too is being pulled with the rest of us, into the crazy headlong stampede of trying to get too much done in too little time to do it at all. For him the situation is even more taxing, for he

must try to achieve the overwhelming number of responsibilities he has inherited as ED while participating in and leading multiplying numbers of initiatives to enhance excellence, but all this in the context of having to learn about and understand the organization in all its complexities, while also trying to lead the change. I am now wondering whether the request for clarification has been made regarding Tuki's comment concerning the OD/ IM tension to which Clive refers, or whether, in fact there has been no time to ask it?

Clive was telling us yesterday at the phase 2 FDP group meeting that significant progress has been achieved toward redress of the situation in terms of future undertakings, but I wonder how much damage we are doing while we are obliged to meet our existing obligations, and wonder whether we can do anything within the existing constraints to give ourselves more time. *What sacrifices must we make to enable us to meet our absolutely essential obligations?*

Each of us has so many of them that we must continually ask which of even those must be sacrificed in ever increasingly frantic attempts at prioritization. But what is hard - really hard is that so often we are forced by circumstances to sacrifice those things that we most wish to engage with, those that are most valuable and meaningful, and even those very things that will bring about release for the unrealistic rush.

The FDP, action learning groups, writing, the CIG! These are the key initiatives in our context of practice development, capacity development, and above all, to organizational integrity (coherence). Yet more and more I hear these being regretfully questioned, which I summarize in a paraphrase that synthesizes what is being said: *Can I afford to remain with these processes? In the final analysis, I will be appraised on the things I am being specifically PAID to do in programmes, projects and management. I have to find a way to protect my survival so that I am still standing and able to achieve my bottom line responsibilities, which on their own are too much to accomplish. I can not afford to participate in anything else.*

And me, how am I responding to this situation? At each decision point in my life at present, I have to decide what to sacrifice to make time for bottom line essentials. A lot of what I would like to be doing happens in my head: writing, planning, interactions, conversations, response and actions many of which never are realized. Even reading Clive's short paper was a challenge: I carried it with me over 5 days, mislaid it twice, became really excited, and started planning my engagement with it. But now, the level of my engagement is constrained by the decision to sacrifice some of my deadlines and take the consequences, as I know that Clive has a deadline of Friday.

The learning of relevance to Clive's research that I see in this is my growing insight concerning the extent of the challenge, and contingent upon that, is my realization of how carefully we will have to plan what and how we undertake as CIG, because I am sure that many people, like me so very much *want* to participate, that they could easily be tempted to commit to too much. In the current climate of a growing focus on enhancement of

excellence, I see this as a very real danger in our work context, which I believe comprises committed people with a passion for development. As I have said elsewhere, if we fail to let anything else go to make space for the new, the threat lies in the overbalancing of our very attempts at achieving excellence, till they become part of the problem.

I don't have the answers, but I have a deep faith in the power of dialogue and collective wisdom in finding creative ways of addressing the impossible. The only trouble is of course, that it will take time.....

I've a hole in my bucket, dear Henry, dear Henry, I've a hole in my bucket dear Henry a hole!

As I write this, I am reminded of the trapped feeling of powerlessness I experienced in the apartheid era, while trying to develop realistic but meaningful strategies for responding to aspects of the situation.

Two other issues I would like to touch upon, but can not explore. First is the issue of honesty, openness, relationship and ultimately Clive's dual roles in the research and in the organisation, and the second, is the linked issue concerning the mandate of the group. It was these aspects more than any other that gave me the thunderbolt experience.

To Clive (continued)

Wow, Clive: this one is a biggy! What keeps pounding back at me is the realization that as a practitioner / researcher much of this going to be out of your domain. You can develop yourself to be the most competent, skilled, sensitive, excellent, but are others ready or able to respond at your level? My own view is that the deeply spiritual, highly abstract, philosophical level at which you function is rare, and that few people achieve. **(Comment from Clive: Glen has referred before to the "highly abstract level" at which I work, but I have never perceived my work in this way. As I see it, what I do is grounded in my varied experience in the fields of biology, agriculture, education, health, and OD, into which I attempt to integrate readings, reflections, meditations, music and other art forms. I perhaps need to try to explain this in terms of Richard Bawden's interweaving learning cycles.)** In the KM readings you have shared with us, most of which I have read or scanned before, in one small part of one paper I could see myself pushing at the ceiling of my capacity for the abstract. With time, (there it is again) I would be able to pull out the full meaning, but it comes back to the necessity for prioritization. And also how will other colleagues respond to such situations? I know that you offer the readings as resources to be used or not at will, but I am really only using this aspect to go somewhere else, and I am trying to feel my way into it, so please bear with me, and perhaps I will be able to find it.

Once again, I think, it will be tempting for participants to engage with all readings, in a real desire to learn, but what will the consequences be down the line? With a long academic history behind me, I am a little bit freaked on your behalf (?) by the implications of some of your questions. I imagined myself in

your position, of staking an entire study on a CIG and finding that, apart from perhaps never achieving an organizational 'mandate' or 'representativeness', it starts to crumple from all the pressures before it has gone as far as you would like it to go. But even more lurid are my imaginings of the possible organizational and relationship consequences of honesty and transparency, which you may be able to manage with excellence, on people who may be so very far from ready. Perhaps I am being melodramatic in my imaginings, but nonetheless, your reflection has made me think that as a CIG we should consider addressing the following, now we are all becoming familiar with some of the concepts and possible implications:

- Talking through these things, and revisiting the issue of collective and facilitator/researcher responsibilities and relationships
- Looking more carefully at conditions of participation
- Revisiting the mandate, 'representativeness' and authority of the group, and striving to clarify and or redefine it at organizational level to get it really working for both you and TVT
- Strategies for working cooperatively and constructively with the uncomfortable and possibly the unwanted honesty.

For me personally, in terms of the theoretical constructs we have looked at so briefly, I am wondering whether we might be able to develop some consensus on the meaning of the KM term /and or possibly identify a more meaningful term. Then on a more pragmatic, practical level, I would be really interested in exploring principles, conditions ways of sharing knowledge that has been co created in a particular context to people /institutions outside of that context that we can apply to the documentation process at TVT.

✂

Lungile also responded to my first writing as follows:

Hi Clive

I am almost ashamed to say, yet again, I am sorry my response is so late. With that being said, I am quite concerned about your research as a whole; with us failing to meet as requested and not having enough representatives in the group. Does this affect your research, are you having to chop and change things from your proposal as you go along? This is direct from your second question in the paper you circulated.

On a more personal level, I am concerned about the way that what we learn and experience could be disseminated to others. I know I never had this chance with PDP and FDP the previous years. I am worried about the influence of what we learn - is this a personal thing or is it meant to influence the organization entirely? I go around and mention 'knowledge pyramid' when talking about the data that we collect on the field and I get these blank stares from people. I can't help thinking I am eliminating people once I start mentioning something they don't know about. I get a sense from people that at TVT there are these invisible boundaries that segregates the elite, privileged and common 'working folk'. I think that is where terms like '*Academics*' and '*us*' come from.

After going through this paper...

1. I can't help thinking that knowledge is highly influenced by what we know and what we (think we) believe in. All of which is not constant, it is also influenced by our situations and circumstances, which are also not static. What is significant to me going in will become the highlight or 'take home' for me in a new situation or after a focus group. An aspect of it will be more highlighted and therefore stand out. As much as I go on to the field and open myself up for new things and new learning, I have these beliefs that are sometimes tested and shaken. Having worked with CBH¹¹⁵ briefly, I have tested this through their work with the communities and clients.
2. I think... what I know (and therefore consider as knowledge) ---- experiences -- change/alteration in view point --- processes of acceptance of new knowledge and therefore what I know ---- room to influence others/system ---
3. The question of 'Context' is a big one for me----I think that certain knowledge is suitable/appropriate in certain context
4. I am happy that as a group that we have that the knowledge pyramid is not linear but the arrows bi-directional and can break at anytime

I hope this is not confusing as I think it is.

Many thanks for this opportunity

Lungile

✂

And Claudia responded as follows:

I shall attempt to provide a reflection on something that I have not attended.

I have always liked the quote (I don't know where it came from): "We are drowning in information and starving for knowledge" - what do we really know? Who is going to sift through masses of numbers, data and facts to filter, transform, translate or interpret them into knowledge? What is meaning? Are data with meaning knowledge? Is knowledge different for every person? A person's HIV status, for example, could be negative or positive, it could even be translated into the most basic computer language: binary, 0/1, on/off: However, what does that mean to that person and what does that mean to another? (after reading the articles I know (!) that meaning plays a central role)

Next question: What is a realization? Is that the dawning of meaning to create knowledge?

Socrates said: "I know that I don't know" and embarked on a journey to find the wisest of the wise (or something to that effect) and consulted many reputable colleagues of his time in the process - he never found the person he was looking for. The youth admired his practice and followed him through the streets. To me, this is the ultimate of "holding a process". The 'realizations' that we are talking about in our purpose are, I think, quite intimately connected to the creation of

¹¹⁵ The Community Based Health Department at The Valley Trust.

knowledge but the levels seem somewhat unpredictable: An approach at one level may cause knowledge or realizations (what is the difference between the two?) at another or even at two or three different levels which at times can be difficult to put into words. It is similar to those things that we just KNOW (whether by means of intuition or otherwise), sometimes we don't even believe ourselves that we do know.

What Lungi wrote about the Peer Education Programme is disconcerting. It raises the question of how much of 'knowing' (once a situation has emerged from the 'sea of ignorance') can be warranted without action for the sake of research.

There is a paragraph in one of the articles (David Snowden) that sounds important but somehow I can't quite figure what it means (p. 105): *"This is particularly true where the cost of knowledge creation within the organizations is high as this tends to knowledge hoarding and secrecy that in turn can blind the organization to new and changed circumstances."*

The following questions emerge

- Did he mean to say 'leads' instead of 'tends'?
- Who is hoarding which knowledge?
- Why in secrecy?
- What does that mean for a learning organization?
- ... and in the context of what is written above the paragraph quoted: Do unique situations and unique responses lead to "foolishness" or to learning? What is it what we learnt? Case studies? Appropriateness for the moment/in the context?

Appendix 4

The Valley Trust's knowledge work strategy, version 5, October 2010.

The strategy is also available on The Valley Trust's website:

<http://thevalleytrust.org.za>

A knowledge work¹¹⁶ strategy and implementation plan for The Valley Trust

Version 5: 5th October 2010

Clive Bruzas

Introduction.

The Valley Trust has, since 2001, talked about the need to embrace knowledge work as a key dimension of its practice; currently, this is expressed in our first and seventh strategic priorities for the period 2008 - 2012: *to monitor, evaluate and research our work in a participatory way to enhance effectiveness and contribute to knowledge creation and sharing, and to enhance our effectiveness by working as a learning organization.*

Various attempts have been made to institutionalize this intention, including the establishment of a "research office" in 2001, which was incorporated into the newly-formed Organizational Development Department. The organization also strengthened its monitoring, evaluation and research (M, E & R) capacity at one level by employing staff skilled in quantitative data gathering and capture, GIS methodology, and statistics. However, the work was never fully and consciously integrated into The Valley Trust's evolving¹¹⁷ practice.

More recently (April 2008), the M, E & R Division was established as part of The Valley Trust's restructuring process. This Division has taken up the responsibility for coordinating and facilitating knowledge work across the organization, but at this point it must be emphasized that knowledge work must increasingly become an integral part of a seamless Valley Trust practice, and as such should not be viewed as the sole responsibility of the M, E & R Division.

What is driving the knowledge work initiative at The Valley Trust? The NGO sector enjoys a reputation for effectiveness, but there is a growing body of literature which challenges this view. For example, Edwards and Hulme (1996 p. 5) note that *"...there is increasing evidence that NGOs and GROs¹¹⁸ do not perform as effectively as had been assumed in terms of poverty reach, cost-effectiveness, sustainability, popular participation (including*

¹¹⁶ The term "knowledge work" is used here in preference to "knowledge management" to include all those activities related to the creation and sharing of knowledge which so often get neglected in the work of an NPO: regular data gathering, data analysis, monitoring, documentation, evaluation, conversations, action learning, research, etc. Please refer to Appendix 1 for an extended discussion of the term "knowledge work".

¹¹⁷ It was only in April 2005 that The Valley Trust started to explore its practice in a coherent way through the Practice Development Programme.

¹¹⁸ Grass Root Organizations.

gender), flexibility, and innovation"; Pieterse (1998 p. 13) states that "In real terms, the contributions and role of NGOs are relatively inconsequential to the everyday existence of the 53 percent of the South African population (approximately 20 million people) below the poverty line"; and Smit (2007:1) comments that

Notwithstanding over 50 years' experience in development co-operation, the urgency for development NGOs to improve their effectiveness, efficiency and impact is enormous. A wealth of experience has been built up over the years. Some of the innovative approaches of yesterday are now common practice - and some of yesterday's mistakes and dilemmas have hardly changed. Do we learn from our own and others' experiences in order to improve our effectiveness, efficiency and impact? And, if the answer is yes, do we recognize what we have learned, and how?

Quaggiotto (2005) highlights the potential of knowledge work for NGOs by stating that *Perhaps the main factor that accounts for the enduring appeal of knowledge management in development organizations is the stronger motivation for development practitioners - when compared with their counterparts in private companies - to analyse and eventually overcome barriers to knowledge sharing across organizations, communities or even governments in order to maximize their impact on the ground...Another element that may explain the continued interest in knowledge management in the development context - this time externally driven - is the increased call for transparency and accountability within this sector. Rightly, development organizations face increasing demands from donors and the general public to provide detailed information on how effectively they spend their funds and what mechanisms they put in place to avoid repeating mistakes that can often have a high cost not only in financial but also in humanitarian terms.*

Thus, for us at The Valley Trust, three imperatives are driving this knowledge work process:

- (i) The striving for greater effectiveness as an NPO;
- (ii) Accountability (to the clients with whom we work, to our donors, to society in a broader sense - we are, after all, part of civil society - and to ourselves);
and
- (iii) The sharing of knowledge as a contribution to the broader discourse around health and development.

This strategy and implementation plan therefore draws on our own experience and learnings, as well as on the writings of others working in various fields of knowledge creation and sharing, to present a way of institutionalizing knowledge work across The Valley Trust, with a pilot phase running from April 2009 to March 2012.

Key elements of the strategy.

1. It should be piloted over a period of time that allows a reasonable chance for it to succeed, from 1st April 2009 to March 2012.

2. It should be appropriate to the identity¹¹⁹ of The Valley Trust. Historically, the organization has probably viewed knowledge more as "thing" than "flow" (Snowden, 2002), and has probably privileged hard knowledge over soft knowledge (Hildreth & Kimble, 2002). However, it is emphasized here that an approach which incorporates the strengths of different knowledge paradigms should be adopted so as to offer a broad range of methodological options. The complex nature of developmental work (Bopp & Bopp, 2004) should also be acknowledged, and it should be accepted that our knowledge work will require more than a "cutting and pasting" of private sector approaches (although these may at times prove helpful). In general, the emphasis is likely to be on process rather than product, although the importance of knowledge-related outputs such as reports and other forms of documentation such as videos, should not be underestimated. With regard to process, Conlin and Stirrat (2008) state that *"Whilst there will remain space for positivist approaches in certain sectors of the (development) industry, it is increasingly likely that other approaches will become more dominant."*
3. Given our identity, our knowledge work should be an integral part of our practice (ie. should not be an "add-on"); it should be useful (Patton, 1997), and it should be participatory (Reason, 1998a).
4. The strategy must build on what is already in place at TVT and the progress that has already been made. It will draw on the work which has been done by the Cooperative Inquiry Group (CIG) at TVT, as documented in six knowledge work writings over the past two years; in our Annual Reports; and in various other reports. It will also draw on the existing processes across the organization, and will seek to strengthen existing *ba*¹²⁰, such as All Staff meetings, the Quality Assurance Committee, divisional teams, etc. It will draw on existing organizational knowledge, both tacit and explicit, and it will take into account methods and tools which have already been introduced to The Valley Trust's work, such as the EvaluLead framework (Grove et al., 2005).
5. Staff capacity will need to be built for knowledge work across the organization; this will need to be done sensitively and appropriately, at a pace which takes into account organizational processes and rhythms, and in a manner which is thoroughly grounded in our practice. Such capacity building will include, for example, the strengthening of

¹¹⁹ Our vision is *communities in which people take responsibility for improving their own health and quality of life within a democratic society*. Our first strategic priority states that we wish to *monitor, evaluate and research our work in a participatory way to enhance effectiveness and contribute to knowledge creation and sharing*. Our purpose is to *enable people to initiate and sustain their own developmental change processes*. Two of the processes which we use in our work are *action learning* and *action research*. And we commit to core values of *human dignity, integrity, enablement, sustainability, and proactivity*.

¹²⁰ *Ba* is a Japanese term implying a *"shared context in which knowledge is shared, created and utilized"* (Nonaka et al., 2000).

documentation skills, and the development of the ability to “read” developmental processes.

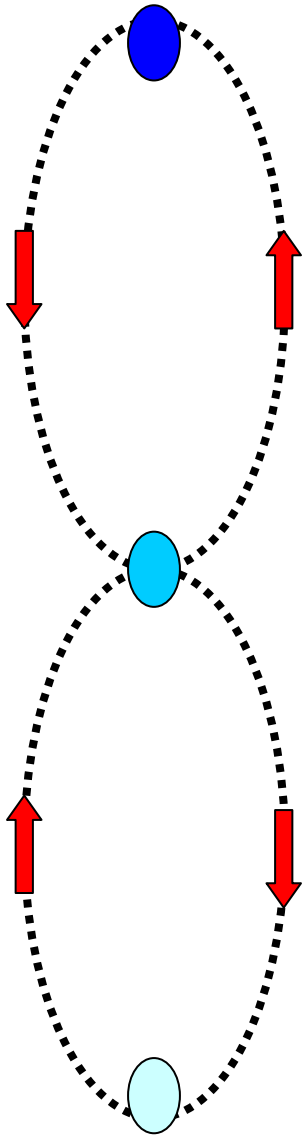
6. Knowledge work processes will require skilled facilitation, probably by members of the M, E & R Division, although management as a whole will have a significant part to play. The requirement for M, E & R's facilitation role may decrease as the capacity for knowledge work strengthens across the organization, or the nature of the facilitation may change (for example, the mentoring role of the M, E & R Division may increase).
7. Given the identity of the organization and its expressed intention to work in a participatory way to create and share knowledge, there will be a need for creative forms in which knowledge can be “documented” and shared, eg. Patton (2002), Richardson¹²¹ (2000), and Springgay *et al* (2005).
8. When knowledge work is undertaken in partnerships, there will be a special need to proceed with caution. Partnerships may bring together different paradigms of knowledge, which could either introduce a positive creative tension or a negative struggle for dominance.
9. Given the need to integrate knowledge work into our practice, the role of leadership and management in actively and positively supporting the implementation process will be critical.
10. Progress towards the integration of knowledge work into the organization's practice should itself be monitored and evaluated, although as Hellström and Jacob (2003:57) point out,
When evaluating KM [knowledge management] programmes we are...trying to hit a moving target, because when we advance, the goals change due to what is learnt in the process - indeed if they do not change we may not be advancing at all.

Implementation plan.

The details of the implementation plan can be represented in various ways. This document draws on several sources to do so: the “figure of eight” diagram¹²², the work of Ben Ramalingam (2005a, 2006), and the writings of Hildreth and Kimble (2002), and Snowden (2002).

¹²¹ Richardson has proposed five criteria (p. 937) for what she calls “creative analytic practices”: substantive contribution; aesthetic merit; reflexivity; impact; and expression of a reality.

¹²² See the table on page 245. Refer to Annexure 2 for an explanation of this diagram.



	Knowledge work	Support required	Responsibilities and timeframes
(i)	Sharing of knowledge outside the organization.	(i) Preparation for conferences, workshops, publications, engagement with government and other stakeholders	(i) M, E & R Div assists colleagues across TVT (<i>ongoing, increasing with time</i>).
(ii)	Feeding new learnings back into TVT	(ii) Report writing and dissemination throughout TVT	(ii) As above
(iii)	Engagement in various forms with students and faculty of higher education institutions	(iii) Design of programmes, ideally in partnership with higher education	(iii) M, E & R Div assists colleagues where necessary
(i)	Organization-wide sharing of knowledge.	(i) Audit of existing knowledge resources. Development of knowledge sharing tools and technologies.	(i) M, E & R Div (<i>in 2010</i>) with leadership and management support
(ii)	"Meta-evaluations" to draw out common learnings for documentation and sharing.	(ii) Documentation of learnings.	(ii) M, E & R Div (<i>ongoing</i>)
(iii)	Incorporation of learnings into (a) organizational practice; and (b) reports and proposals.	(iii) (a) Practice development programme and (b) QA for report and proposal writing	(iii) (a) Practice development team and (b) QA committee (<i>ongoing</i>), both with Leadership and management support
(i)	Baseline of resources and skills available	(i) Audit of resources and knowledge skills	(i) M, E & R Div (<i>2010</i>)
(ii)	Monitoring at project level (appropriate data gathering, recording, storage, analysis, documentation and application).	(ii) Capacity building for monitoring and associated activities	(ii) Coordinators and facilitators with support from M, E & R
(iii)	Evaluation & research at project level.	(iii) Capacity building for E & R, and conducting E & R.	(iii) M, E & R Div (<i>ongoing</i>). with int & ext support
(iv)	Mutual learning with clients.	(iv) Facilitated reflection.	(iv) M, E & R Div supports colleagues (<i>ongoing</i>)
(v)	Action learning	(v) Incorporation of learnings into practice, plans, etc	(v) Leadership and management
(vi)	Quality assurance.	(vi) Monitoring of quality	(vi) QA com and other staff

Implementation processes.

It is emphasized at this point that knowledge work should, wherever possible, be supported, facilitated, and nurtured rather than imposed. However, given that it is an agreed organizational priority, and given that several previous initiatives to institutionalize knowledge work have met with limited success, there is now a requirement that processes (and a very limited number of procedures) be introduced to ensure that knowledge work takes its intended place as an integral part of our practice. This requires the cooperation of all staff, but especially of leadership and management.

The following details expand on what has already been presented in this document:

1. Gaining an understanding of what is already in place. Mention has been made of historical and current initiatives. In 2010, two audits will be undertaken to establish (a) what has been documented in terms of knowledge at The Valley Trust, and (b) what skills are available within the organization and amongst our partners. These audits will be documented in appropriate forms: (a) documents will be entered into the Library data base, and will be retrievable via a key word search. The search facility is available for installation on any staff member's computer. Key documents will also be made available electronically on the network, for which an appropriate taxonomy is currently being developed; (b) knowledge skills will be documented as part of the organization's ongoing personal development processes, and will need to interface with other skills audits, performance appraisals, and the workplace skills plan.
2. Creating appropriate space-time (*ba*) for knowledge work. It is envisaged that, with time, knowledge work will become an accepted part of the daily work of every staff member, and to reach this point, a structured process designed by the Leadership Team will be adopted to create the time required for knowledge work processes to be undertaken. The principal *ba* for sharing reflections will be the home week, and again, the appropriate structuring of home week will be determined by the Leadership Team. At present, home week is held once every two months, but this frequency may need to be reviewed. It is also suggested that home week be extended by one day.

Following each home week, the knowledge which has been "collected"¹²³ will be processed by the M, E & R Division, and then made available in the following ways:

¹²³ Here it is important to note that much of the knowledge that may be shared through these home week processes will be tacit in nature, and as such will resist "capture" in the conventional sense. However, knowledge shared in this way should influence practice, and managers and coordinators will be encouraged to look for and document, changes in practice.

- (v) Written documents and photographs will be made available on the network. From here they may be accessed for use in report writing, proposal development, and as a resource for workshops, conferences, training events, etc.
 - (vi) Written and photographic material will be shared through the Newsletter.
 - (vii) Written, photographic, and video material will also be shared via the website.
 - (viii) Material of any form can be requested from M, E & R. Support will be available for hard copy, electronic, or video/DVD formatting.
3. Capacity building for M, E & R. Depending on what decisions are taken about home week, a considerable amount of capacity building could occur during the days of home week. However, other forms of capacity building will also be implemented:
- a. After the first home week of 2009, every staff member engaged in programme work (and this may be extended to staff in other sections), will be expected to keep a diary/journal in which they record the details of their daily activities. This will provide a valuable record of the basic data required for monitoring and reporting.
 - b. In addition, appropriate tools will be developed for data gathering with the assistance of the M, E & R Division¹²⁴. A wide range of tools is already available, and these may be adopted or modified according to need.
 - c. Assistance will also be provided by the M, E & R Division for the orderly and ethically acceptable storage of data.
 - d. Using the data available, and drawing on a growing discipline of personal reflection, staff will be encouraged to write two-monthly reports¹²⁵ for submission to their coordinators/managers/senior managers. These reports could, in time, form the foundation of preparations for home weeks, and will also be valuable for the compilation of donor reports. The writing of two-monthly reports will also develop sound documentation skills. It will be essential, however, that coordinators/managers/senior managers provide adequate feedback to colleagues on their reports.
 - e. The M, E & R Division will also work with colleagues to provide project-specific support for monitoring and evaluation of projects.
4. Undertaking evaluations. The M, E & R Division will undertake evaluations where they have the capacity and expertise to do so. In the event that they are unable to undertake this work, suitable outside resources will be located. In contemplating the need for evaluations, the wisdom of Michael Patton (1999) should guide the organization: he maintains that a project should never be evaluated until it is "proud".

¹²⁴ This process may require that tools developed by donors be taken into consideration, eg. JHHESA's (Johns Hopkins Health Education in South Africa) on-line data capture tools.

¹²⁵ Examples of monthly reports are available from the Senior Manager: M, E & R. The frequency of reporting also needs further discussion by Leadership and Management.

In other words, do not be too hasty to evaluate a project that has not had adequate time to make a difference.

5. Undertaking "meta-evaluations". The M, E & R Division will, with the participation of colleagues, attempt to draw organizationally-relevant learnings from a range of reports and other documents, so as to inform organizational practice and proposal development.
6. Developing service learning projects. The M, E & R Division will assist colleagues who wish to engage with students, to develop appropriate curricula and support materials. This work will need to be undertaken in close partnership with institutions of higher education, and will depend on available staff capacity.
7. Incorporation of learnings into practice, into reports, and into proposals. While the M, E & R Division can be expected to guide, facilitate, support, and in some cases to implement, it is the responsibility of all staff, and especially of leadership and management, to ensure that learnings are *used*. This means that:
 - a. The team responsible for whatever form the organization's ongoing practice development programme may take, incorporate emergent learnings into the practice development programme to ensure greater effectiveness;
 - b. Staff members responsible for writing reports include learnings as part of those reports;
 - c. Staff members responsible for developing proposals incorporate learnings and innovations into proposals;
 - d. Staff who participate in conferences, workshops and seminars incorporate learnings into their presentations;
 - e. Staff who write for publication draw on the learnings to inform their writings;
 - f. Staff working with students incorporate the learnings into their facilitation.
8. Research. While research has not been highlighted in this strategy, it must be emphasized that as knowledge work becomes more accepted within the organization, the interest in research will increase. It is anticipated that the desire to inquire more deeply into the *meaning* of our work will stimulate a variety of research questions which can be addressed either as an ongoing part of our work, or form the basis of specific research projects which may be undertaken with outside assistance, eg. with Master's or Doctoral students.

Assessment of staff's participation in organizational knowledge work.

As noted on page 246, knowledge work should ideally not be imposed, as this has the potential to undermine the process. However, in order to ensure the growth and development of knowledge work as an integral part of the organization's practice, the

contribution of staff to knowledge work should remain a part of performance appraisals. The existing performance appraisal format takes into account many aspects of knowledge work, and this can provide an opportunity to monitor and guide the performance of staff in relation to knowledge work. Where references to knowledge work are missing from job descriptions, it will be necessary to include these requirements,¹²⁶ and this should be included to any revisions to job descriptions currently under way. In particular, the job descriptions and performance appraisals of Leadership and Management will need to set examples in terms of the advancement of knowledge work.

Evaluation of the strategy.

As noted on page 244, the evaluation of knowledge work is by no means a simple undertaking. However, this strategy already lays the foundation for its own monitoring and evaluation. The following list is by no means exhaustive, and will be developed further with input from colleagues.

1. Outputs. There are a range of outputs associated with the strategy:
 - a. A knowledge resource audit.
 - b. A knowledge skills audit.
 - c. Various documents which will emerge from each home week, including the Newsletter.
 - d. Regular progress reports (the quality of these should be monitored).
 - e. Improved donor reports and proposals (the role that more easily-accessible information and knowledge plays in the development of these should be monitored).
 - f. Conference and workshop participation.
 - g. The website.

2. Outcomes. The critical outcome is greater effectiveness, and there are a wide range of options for evaluating this, depending on the context.
 - a. The organization's contribution to significant change (Willettts & Crawford, 2007) at community level.
 - b. A deepening understanding amongst staff members of the organization's practice and their contributions to that practice.
 - c. A growing comfort amongst staff with knowledge work processes, such as reflection, writing, and "reading" developmental situations.

¹²⁶ Such details are likely to be job specific, so no generic guidelines are provided here. However, there are likely to be broadly applicable requirements such as evidence for appropriate reading, writing, learning activities, etc. the M, E & R Division can assist with developing this aspect of job descriptions.

- d. Increased donor interest related to our demonstrated ability to learn and innovate.
3. Process. This would include:
- a. The perceived benefit of home week by staff.
 - b. Increased desire for personal development, including reading, mentoring, and relevant study.
 - c. Improved integration amongst teams within divisions and amongst divisions themselves.
 - d. Enhanced quality of, and participation in, organizational conversations.

An especially valuable tool would be the "five competencies matrix" recommended by Ramalingam (2006:12), which would provide us with a baseline for many aspects of organizational knowledge work, and would also enable us to monitor change with time.

Budget.

A draft budget is available for the work of the M, E & R Division over the next three years. However, agreement will need to be reached on where the cost of organizational processes is located. It may be possible to seek "contributions in kind" from other divisions, such as free venues from Organizational Support. Of course, *all* divisions will be contributing through the very real costs associated with attending home week. However, again it is important to state that the costs associated with knowledge work should not be perceived as "extra" costs, but as an essential component of our operational budget. Here, reference can be made to Ramalingam's (2005a) seventh question: *How does an organization measure the costs and benefits of learning and not learning?* It may be relatively easy, in financial terms, to measure the costs of learning; however, the costs of *not* learning, while less immediately obvious, may even extend to the decline and eventual demise of the organization.

Annexure 1 to Appendix 4: Toward an understanding of the term "knowledge work"

As noted on page 1, the term "knowledge work" has been used in this document in preference to the term "knowledge management", to include the many and varied activities which are associated with knowledge creation and sharing, terms such as data "capture", data analysis, documentation, monitoring, evaluation, research, reflection, and learning. In the past, these terms have often been used in isolation at The Valley Trust, and/or sometimes associated with the work of a particular department or even an individual staff member. This led to a perception that the activities themselves are isolated and disconnected, and implied that documentation was, say, "the work of the OD Department", or that evaluation is something "added on" at the end of a project. However, the approach which we are now striving to follow is one of integration across the organization, and as such, the creation and sharing of knowledge in all its many facets will increasingly become part of a seamless organizational practice. This means that the creation and sharing of knowledge will become a conscious part of our *practice*.

Another reason for preferring the term "knowledge work" is that the term "knowledge management" has many of its origins in the corporate sector, and while there is much that we can learn from this sector, we also need to heed the caution expressed by Ramalingam (2005a:8) that "...'*knowledge for development*' faces a distinct, perhaps more complex, set of challenges" than those existing in the corporate sector. We also assume that the development sector, at least the NGO part of it, has a genuine desire to create and share knowledge for what Reason and Bradbury (2001:1) have termed "*a world worthy of human aspiration*", rather than for attaining a corporate "competitive edge" or "competitive advantage". This means that the *management* of knowledge (in corporate terms) is less important to us than *working* with knowledge in a free, open, participatory, and transparent way.

This may seem like an unnecessarily subtle distinction, but the language of knowledge work is fraught with paradoxes and specialist terms. For example, Hildreth and Kimble (2002) have pointed out that knowledge is both "hard" and "soft", and Snowden (2002), in his influential paper, has described knowledge as both "thing" and "flow". Eisner (1997) has noted that "*Knowledge as process, a temporary state, is scary to many*". Thus, while it may be possible to manage hard knowledge (as a "thing"), it is much more challenging to manage soft knowledge which flows and which lives in relationship. This challenge has given rise to attempts to find ways of "converting" soft/tacit knowledge into explicit knowledge which can be "captured" (see for example the work of Nonaka *et al* (2000)), but such approaches are viewed with skepticism in some quarters (D'Eredita & Barreto, 2006). Such difficulties have led to a growth in the use of metaphors (eg. "knowledge as love") to describe knowledge work (Andriessen, 2007). Indeed, the use of the term "knowledge management" has been questioned by Wilson (2002), who notes (p. 1) that "...'*knowledge management*' is an umbrella term for a variety of organizational activities, none of which are concerned with

the management of knowledge". And Zeleny (1996) has pointed out (p. 1) that "Although information is an enhanced form of data, knowledge is not an enhanced form of information". So while we may manage data, and perhaps to a lesser extent information, knowledge is very different: we may not be able to *manage* it, but we can certainly *work* with it.

Thus we have chosen the term "knowledge work" in an attempt to (i) promote the understanding that the varied aspects of knowledge creation and sharing are an integral part of our work; (ii) demystify the terminology; (iii) adopt a term which reflects the special and complex nature of the challenges associated with knowledge creation and sharing in the development sector; and (iv) promote various "ways of knowing" which enhance perspectives rather than strive for certainty.

These ideas will be further developed as the strategy is implemented over the next three years.

Annexure 2 to Appendix 4: The "figure of eight" diagram

A version of this diagram first appeared in The Valley Trust's 1999/2000 Annual Report (p. 4), where it was used to illustrate the growing understanding within the then Appropriate



Technology Department about the systemic nature of our work. The diagram has since been developed, and used as a way to understand different aspects of The Valley Trust's knowledge work. The version pictured on the left was discussed at some length during the organization's 2006 strategic planning, and has been used in reports to donors and in the writings about the work of the Cooperative Inquiry Group at The Valley Trust. In a recent (December 2008) report, the diagram is described as follows:

The lower loop represents our "learning in and from action" - that learning which emerges from the interweaving of action and reflection. For example, some of the recent planning sessions in the Programmes Division have demonstrated a definite willingness amongst staff to engage at a much deeper level with questions about our work: What are we really trying to change? (as opposed to a previous focus on what are we

The figure of eight diagram in current use at The Valley Trust.

setting out to do?); What strategies will we employ to bring about these changes? What evidence will we look for to indicate that the desired changes are indeed happening? This indicates a shift in the thinking of many colleagues, from an activity focus to a results focus.

Moving to the centre of the lemniscate, we come to the "cross over point"¹²⁷, that point which we see as the "organizational level" of the flow of learning and knowledge creation. It is out of this organizational level that we might be able to say that "In the experience of The Valley Trust..." and know that that experience has been discussed, shared, argued, agreed, and perhaps documented, by a majority of staff members. (It is interesting to note that in some cases, this organizational level has been bypassed by colleagues in their work. For example, the work of the former Integrated Technology Department - who did, and still do, as part of the new Programmes Division, really innovative work - was shared through writing articles, advocating, and networking without the rest of the organization necessarily being aware of their learnings). It is at this point (or level) that we find a number of coordinating structures and processes forming or settling in: firstly, there is the relatively newly-formed Leadership Team, made up of the Executive Director and three Senior Managers, one of whose tasks at this level is to integrate the work of the organization. Secondly, there is the work of the Quality Assurance Committee (at the moment made up of three members of the CIG), whose task is to review reports and make recommendations for improvements so that there is a common standard for all reports leaving the organization. And then thirdly, there has been (and at present it is inactive and awaiting a restructuring), the Skills Development Committee, which supports the formal studies of staff members and ideally helps to relate these to both the career path of individuals and the knowledge and skills needs of the organization. So at this strategic level there is an increasing focus on integration, quality, evidence-based reporting, and knowledge and skills development.

The upper loop is perhaps the least understood at this time, possibly due to the fact that the activities and processes associated with this level have historically been the preserve of very few staff members: writing for publication; presenting at conferences; reporting to donors; advocating; engaging with students and faculty. This is the level that will require us to ask ourselves: how can we best represent our work, and the results of our work, to others? How creative can we be? Here it must be emphasized that it is not a case of being creative for the sake of being creative! Participation in, for example, a government-convened committee may present an excellent opportunity for sharing our learnings, but may require very conventional representations of what we do and how we do it.

¹²⁷ The term "point" is used loosely here. It is not viewed as a fixed point, but rather as an opportunity in space and time for breathing, making connections, and coordinating. Something more like T S Eliot's (1963) "...still point of the turning world. Neither flesh nor fleshless/Neither from nor towards; at the still point, there the dance is..."

The figure of eight diagram is thus an attempt to represent something of the *flow* of knowledge at The Valley Trust, and something of the way in which our work can be visualized as a whole. It is a representation that has grown out of ongoing reflection on our work, and as such should be seen as a "representation in progress". It will be interesting to see how it evolves over the next few years.

Appendix 5

The five competencies matrix (Ramalingam, 2006:12)

*I have highlighted in **bold** those competencies which members of the Monitoring, Evaluation and Research Division noted as present within the organization, at a meeting on 6th August 2010 (see page 206).*

	Strategy development	Management techniques	Collaboration mechanisms	Knowledge sharing and learning	Knowledge capture and storage
Level 5 (High)	Knowledge and learning are integral parts of the overall organizational strategy. A set of tools is available and well communicated, and the capacity to apply them is actively strengthened.	Managers and leaders recognize and reinforce the link between knowledge, learning and performance. Managers regularly apply relevant tools and techniques, and act as learning role models. Staff ToRs contain references to knowledge sharing and learning.	Collaboration is a defining principle across the organization. A range of internal and external collaboration mechanisms operate, with clearly defined roles and responsibilities in terms of the organizational goals. Some have clear external deliverables while others develop capability in the organization.	Prompts for learning are built into key processes. Programme staff routinely find out who knows what, inside and outside the organization, and talk with them. A common language, templates and guidelines support effective sharing.	Information is easy to access and retrieve. Selected information is sent to potential users in a systematic and coherent manner. High priority information assets have multiple managers who are responsible for updating, summarizing and synthesizing information. Exit interviews are used systematically.
Level 4	A knowledge and learning strategy exists, but it is not integrated with overall goals. A set of tools for knowledge and learning <i>is</i> available and understood by most staff.	Management view knowledge and learning as everyone's responsibility. Managers increasingly ask for and exhibit learning approaches. There are rewards and incentives for using such approaches.	Networks are organized around business needs and have a clear governance document. Supportive technology is in place and is well used. External parties are being included in some networks.	'Learning before, during and after is the way things are done around here'. Beneficiaries and partners participate in review sessions. External knowledge plays a role in shaping projects.	Key information is kept current and easily accessible. One individual acts as the guardian of each information asset, and encourages people to contribute. Many do.
Level 3	There are ongoing discussions about developing a knowledge and learning strategy. A wide range of tools are being used across the organization.	Knowledge and learning is viewed as the responsibility of a specific role or roles. Some managers talk the talk, but don't always walk the walk!	People are using networks and working groups to get results. Peers are helping peers across organizational boundaries. Formal collaboration mechanisms are being created and recognized.	People can find out what the organization knows. Some examples of sharing and learning are highlighted and recognized across the organization. Some information translates across boundaries.	Specific groups take responsibility for their own information and begin to collect it in one location in a common format. Some is summarized for easy access by others. Searching information assets before starting activities is encouraged, as is sharing lessons afterwards. Some handovers take place.
Level 2	Many people say that sharing knowledge is important to the organization's success. Some people are using some tools to help with learning and sharing.	Some managers give people the time to share and learn, but there is little visible support from the top.	Ad hoc personal networking is used by individuals who know each other to achieve goals. This is increasingly recognized as vital to the organization.	People learn before doing and programme review sessions. They sometimes capture what they learn for the purpose of sharing, but in practice few do access it.	A few groups capture lessons learned after a project, and look for information before starting a project. There is potential access to lots of information, but it is not summarized.

<p>Level 1 (Basic)</p>	<p>A few people express that knowledge is important to the organization. Isolated individuals begin to talk about how important - and difficult - it is.</p>	<p>Knowledge and learning viewed with skepticisms. Management think learning leads to lack of accountability. 'Knowledge is power' at the highest levels of the organization.</p>	<p>Knowledge hoarders seem to get rewarded. There are few cross-cutting collaborations. Silos are hard to break down.</p>	<p>People are conscious of the need to learn from what they do but rarely get the time. Sharing is for the benefit of specific teams.</p>	<p>Some individuals take the time to capture their lessons, but do so in a confusing variety of formats. Most don't contribute to information assets, and even fewer search them. No exit interviews or handovers take place.</p>
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Appendix 6

M & E guidelines developed as part of The Valley Trust's 2009 planning process.

Guidelines for monitoring and evaluating projects at The Valley Trust

Draft 2: 21st January 2009

Clive Bruzas

Please note:

1. The monitoring and evaluation guidelines presented in this document form an important part of The Valley Trust's knowledge work strategy, and should therefore be read in conjunction with that strategy.
2. Given that these guidelines form a part of the knowledge work strategy, the key elements of that strategy apply equally to these guidelines.
3. The guidelines presented in this document are to be applied during planning for the 2009/2010 financial year, ie. all plans for 2009/2010 should incorporate a monitoring and evaluation component as indicated by these guidelines. (Bear in mind that an important aspect of planning any project is its evaluability; in other words, has this project been planned in such a way as to make an evaluation possible?)
4. Data should not only be collected, stored, analyzed and represented appropriately, but should be *used*, ie. should be incorporated into reflections to assist learning for improved practice, and should inform the writing of reports, proposals, presentations, and articles.
5. For all aspects of knowledge work at The Valley Trust, sound ethical procedures must be followed. The M, E & R Division should be approached for assistance in this regard.
6. Useful additional information can be found in the EvaluLead framework, available [here](#), and in the article on community capacity building, available [here](#).

Part 1: Monitoring.

For every project (or "reporting entity"):

1. Provide the name of the project.
2. State who is responsible for implementation of the project.
3. State who has overall responsibility for ensuring that data is gathered and processed.
4. State the project's objectives or what the project is setting out to change.
5. List the key activities for each project.
6. For each key activity, state what data is to be collected, and how often. When stating what data is to be collected, specify which data is (i) essential (must be collected); (ii) important (should be collected); and (iii) nice to have (collect if time and resources are available). Note whether appropriate data gathering tools are available. *NB: While we*

should be able to specify what data will be collected, we must also remain open to what emerges during the project; if important data emerges during the course of the project this must then be taken into account.

7. State who will validate the data which is collected. (NB: This step may require some discussion, in terms of (i) advisability (there may be questions related to "trust"); (ii) "do-ability" (in terms of time and resources); and (iii) various methodological challenges).
8. Explain where, how, and by whom this data will be captured and stored. Ideally, all data should be captured electronically, and the original forms/recordings/other formats be securely stored. (NB: assistance must be obtained from the M, E & R Division to ensure that (i) data is stored in an orderly manner on TVT's network for ease of identification and retrieval; and (ii) that there is no unnecessary duplication of data).
9. In the event of data being gathered from multiples sites/sources within a project, state who will collate/aggregate the data.
10. State who will analyze the data, and how often.
11. State how the results of this analysis will be documented.
12. State how the documents/results will be shared, if appropriate.

Part 2: Evaluation and reporting.

For every project (or "reporting entity"):

1. Provide the name of the project.
2. Provide the date of the most recent report which has been written on the project.
3. List the recipients of this report.
4. List future report deadlines for this project. (This should be done in consultation with the fundraiser. The deadlines should be included in a table of reporting deadlines, and hyperlinked on the network).
5. Has this project been evaluated? (Yes or no).
6. If Yes, was the evaluation internal or external?
7. State the name of the lead evaluator.
8. Provide a link/hyperlink to the evaluation report.
9. If No, provide a suitable date for an evaluation. (This must be done in consultation with the M, E & R Division, who will assist in compiling an evaluation plan or in locating a suitable external evaluator).

Appendix 7

Primary data sources

Primary Data Sources.

1. Cooperative Inquiry Group recordings:

- 1.1 First meeting: 9th March 2007 (not recorded)
- 1.2 Second meeting: 13th April 2007 (not recorded)
- 1.3 Third meeting: 26th April 2007
- 1.4 Fourth meeting: 24th May 2007
- 1.5 Fifth meeting: 21st June 2007
- 1.6 Sixth meeting: 23rd August 2007
- 1.7 Seventh meeting: 28th September 2007
- 1.8 Eighth meeting: 22nd May 2008
- 1.9 Ninth meeting: 26th June 2008
- 1.10 Tenth meeting: 25th August 2008
- 1.11 Eleventh meeting: 28th October 2008 (not recorded)

2. Interview transcripts:

- 2.1 Interview with Dr Irwin Friedman, 20th September 2008.
- 2.2 Interview with Dr Keith Wimble, 30th December 2009.

3. Journal entries, referenced by date.

4. Research writings:

- 4.1 First writing, 18th May 2007
- 4.2 Second writing, 30th July 2007
- 4.3 Third writing, November 2007
- 4.4 Fourth writing, February 2008
- 4.5 Fifth writing, April 2008
- 4.6 Sixth writing, August 2008
- 4.7 Seventh writing, November 2008
- 4.8 Eighth writing, June 2009
- 4.9 Ninth writing, September 2009

4. The Valley Trust Annual Reports. Botha's Hill, The Valley Trust.

In particular, reference was made to Annual Reports from the following years:

- 1983/1984
- 1999/2000
- 2001
- 2004
- 2009

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