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Knowledge and Learning in Aid Organizations

– A literature review with suggestions for further studies

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Preface

The Swedish Agency for Development Evaluation (SADEV) is a government-funded institute that conducts and disseminates evaluations of international development co-operation. SADEV's overall objective is to improve and expand the knowledge of both the impact of development cooperation in partner countries and the efficiency and effectiveness of such cooperation.

Research at SADEV is conducted in two major areas. The first of these involves the organization of international development cooperation, and focuses on issues such as the management and monitoring of executive organizations, the choice of modalities, donor coordination, and the internal efficiency of donor organizations. The second area is concerned with the short- and long-term impact of development assistance on the well-being of recipient country populations. Results of SADEV's research and evaluations are published as reports and studies. Interim studies are circulated as working papers.

This working paper is a state-of-the-art review in the area of internal efficiency intended for policy-makers and practitioners with a particular interest in organizational development, as well as for internal use. It looks in particular at analyses of knowledge and learning and argues that these would benefit from more systematic reflection on the various types of causes of organizational change, the various types of effects, the normative assessment of results and intertemporal documentation challenges.

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Anders Danielson
Director-General

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Abstract

Knowledge and learning are increasingly viewed as crucial components in improving development aid performance. Research on organizational learning and knowledge management has developed quickly over the last decades. There are many empirical studies that attempt to advise about the effective design of knowledge and learning systems in different contexts. However, current work suffers from weak connections between theory and practice. Notably, there are differing views about how the key concepts of 'knowledge' and 'learning' should be understood, and how both relate to performance. This review paper uses conceptual frameworks from the academic literature to organize and synthesize findings from existing analyses of organizational practice within development cooperation. Rather than presenting yet another set of guidelines, the purpose is to link theoretical, methodological and empirical considerations with one another in order to identify knowledge gaps and emerging issues. This is intended to provide input for practitioners working with organizational development, and guide the design of prospective SADEV evaluations on related topics. In the main, we argue that analyses of knowledge and learning would benefit from more systematic reflection on the various types of causes of organizational change, the various types of effects, the normative assessment of results and intertemporal documentation challenges. A discussion about the implications of these conclusions for future studies wraps up the paper.

1. Introduction

Information about the consequences of our recent actions should guide our decisions about future actions.

[Promoting a Harmonized Approach to Managing for Development Results: Core Principles for Development Agencies, OECD/DAC 2004].

The question of how international development cooperation can make sense of past experiences in order to improve future performance has yet to be answered. The topic emerged as a key issue in early debates about aid effectiveness, with a range of studies claiming that the impact of aid initiatives could be much enhanced if donor agencies and their counterparts devoted more attention to organizational learning (cf. e.g. Cassen et al. 1986). The practical adoption of the knowledge and learning approach by development organizations is often attributed to James Wolfensohn's inaugural speech as the incoming World Bank president in 1996. The subsequent World Development Report launched a plan to transform the Bank into a "Knowledge Bank". In addition to improving accountability, efficiency and effectiveness, the aim was to position the Bank as a unique resource for the collection and redistribution of expertise about development issues (Wolfensohn 1996; World Bank 1998). This initiative is foundational to the currently dominant model of 'knowledge-based aid', which advocates that development agencies (i) implement strategies for internal knowledge management and organizational learning; (ii) develop partnership mechanisms for the transfer of knowledge and learning to the partner countries; and (iii) support development of partner country capacity to absorb, apply and provide knowledge (cf. Ramalingam 2005).

Significant efforts have been made to provide advice regarding the effective design of knowledge and learning systems for development cooperation. Despite increasingly rigorous feedback systems, development agencies continue to be criticised for their inability to incorporate past experiences. They are routinely accused of learning too little, too slowly - or learning the wrong things, from the wrong sources. To date, the repeated call for a synthesis of 'best practice' has been thwarted. A difficulty with making such a synthesis can, in part, be due to confusion surrounding the terms 'knowledge' and 'learning'. While many empirical studies stress the importance of knowledge and learning, they do so without discussing the underlying definitions of these concepts or related assumptions about how they impact performance. This lack of precision can be seen as a reflection of the complexity of the issues involved, but also as a consequence of the increasing diversification and specialization of academic research. Work on organizational knowledge and learning is pursued across a variety of scientific disciplines which together provide many different, partially overlapping, approaches to the field.

In an attempt to clarify and organize the substantial amount already written on knowledge and learning in aid organizations, this paper adopts an analytical approach which reconnects theory and practice in order to open the 'black box' of buzzwords. The

report revisits findings from existing studies of knowledge and learning within development cooperation using organizing frameworks from the theoretical literature. Specifically, the following sections will:

- review the foundational academic writings on organizational knowledge and learning, emphasizing distinctions between different theoretical perspectives (section 2);
- summarize the major empirical findings regarding knowledge and learning in aid organizations (section 3);
- identify some important methodological considerations in the analysis of knowledge and learning in development cooperation (section 4); and
- discuss future evaluations in view of addressing current gaps and shortcomings (section 5).

The purpose of the review is not to provide yet another set of guidelines for how development cooperation organizations should act to improve learning and knowledge sharing. Rather, the overall aim is to link theoretical, empirical and methodological considerations with one another in order to provide input for discussion among practitioners working with organizational development within donor agencies and other concerned bodies. A further purpose is to guide the design of future SADEV evaluations on related topics. In this respect, a specific intention is to outline a basis for a more systematic approach to the assessment of knowledge and learning in development cooperation.

2. Theoretical Perspectives

The academic study of knowledge and learning is scattered across different disciplines, and organizational research on these topics has been influenced by philosophical, psychological, sociological and economic perspectives (cf. Easterby-Smith 1997). The present review does not seek to reconcile these different approaches, but instead focuses on a number of key concepts in the current literature. Four categories are used to structure previous work: 'organizational learning', 'the learning organization', 'organizational knowledge' and 'knowledge management' (Easterby-Smith & Lyles 2003). While these terms appear very similar at a first glance, there are a number of important differences with respect to research focus and normative implications that are outlined below:

Organizational learning commonly refers to the theoretical analysis of learning processes within organizations. Studies are primarily descriptive, and focused on accounting for – and sometimes criticizing – existing organizational practice. In contrast, much of the learning organization literature is aspirational. It seeks to define the means by which organizations can maximise learning (or, in the case of business firms, profitability). Those adopting a learning organization approach generally aim to understand how to create and improve organizations' learning capacities, and seek to establish the preconditions that will lead to this desired outcome. They have a more practical agenda and are more prescriptive than organizational learning researchers (cf. Tsang 1997).

A similar distinction between conceptualization and application can be made between organizational knowledge and knowledge management. Researchers in the former tradition often adopt a philosophical slant in trying to understand and explain the nature of knowledge in organizations. Many discussions relate to distinctions such as the one between tacit and explicit knowledge. In contrast, studies within the knowledge management stream are generally aimed at creating ways of disseminating and leveraging knowledge in order to enhance organizational performance. Here, the role and design of information technology is often in focus. So, whereas the first approach is concerned with what characterizes organizational knowledge, the second is focused on how knowledge is best put to use in operations.

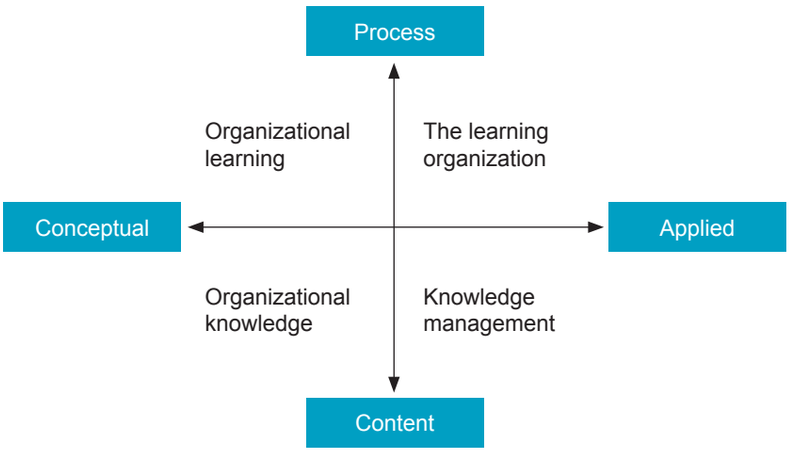

Figure 1: Main theoretical directions of organizational knowledge and learning research. Modified version of Easterby-Smith & Lyles (2003 p. 3).

Figure 1 above classifies the four terms according to the dichotomies conceptual-applied and content-process. While these categories clearly have their delimitations, they provide a convenient organizing framework for a literature review (cf. Easterby-Smith & Lyles 2003). The first classification makes a distinction between theorizing and practical concerns. The second differentiates between, on the one hand, an interest in knowledge as the 'stuff' (or content) that an organization possesses, and on the other hand, learning as a process whereby organizations acquire knowledge.

The variation in research focus is reflected in differences in which tools are employed for empirical investigation. Techniques used in the study of knowledge and learning range from quantitative approaches such as randomized tests and large-scale surveys to qualitative approaches such as interviews, focus groups and participant observation. The choice of method can sometimes be associated with a preference for a certain research paradigm and its associated ontological and epistemological assumptions (cf. Kuhn 1962). This paper will not dwell on these philosophical positions, nor attempt to judge the superiority of one set of beliefs over the other. The following reviews will summarize the core ideas and arguments within each of the four streams, with the assumption that differing tools and techniques provide complementary, not competing, understandings of the phenomena at hand. The author thus adheres to the merits of 'mixed methods' research (cf. Tashakkori & Teddle 2003), an argument shared with much of the recent evaluation literature (see Rallis & Rossman 2003 for a review).

2.1 Organizational learning

The idea that an organization can learn in ways that are not directly deductive to individual members of the organization was first articulated by Cyert and March (1963). Cyert and March's study, often described as the foundational work of organizational learning, sees learning as part of a general model of organizational decision-making. They emphasize the role of rules, procedures and routines in response to external shocks which are more or less likely to be adopted according to whether or not they

lead to positive consequences for the organization. A noteworthy point is the account of different levels of learning: "an organization... changes its behaviour in response to short-run feedback from the environment according to some fairly well-defined rules. It changes rules in response to longer-run feedback according to some more general rules, and so on" (ibid. p. 101-2).

Cyert and March see learning as a strategy for increasing organizations' efficiency. An alternative approach is the idea of different learning types developed by Argyris and Schön (1978). They distinguish between single and double loop learning. Single loop learning takes place when organizations deal with first-order problems (symptoms) to find efficient solutions without changes to commonly agreed upon routines. In contrast, double loop learning occurs when organizational members question existing frames of reference and are open to rethinking of strategy. The level of triple loop learning has subsequently been added and represents a 'highest' form of organizational self-examination where people may challenge the very raison d´être of the organization (Argyris & Schön 1996). It signals that learning has become deeply embedded in the organization, rather than being merely an espoused value (cf. Schein 1992). The levels are not independent. In contrast, learning is viewed by many authors as a cyclical process involving a phase of reflection on actions and experience. This results in a reframing of original strategies, leading to new and improved actions in the future (cf. e.g. Pedler & Boutall 1992).

A difference between the view of organizational learning proposed by Cyert and March and Argyris and Schön is that the latter approach does not assume that human behaviour within organizations is instrumentally rational. On the contrary, both individuals and organizations seek to protect themselves from learning by establishing defensive routines. Subsequent research has made important contributions along the same lines, emphasizing for example the distinction between learning and unlearning (e.g. Hedberg 1981), and clarifying that learning need not be conscious and intentional (Huber 1991). The relationship between learning and performance has also been questioned, with some authors arguing that learning does not always lead to 'intelligent' behaviour that increases an organization's effectiveness (cf. Levitt & March 1988; Miner & Mezias 1996). In the main, however, research has continued to follow the neorationalist tradition which suggests that it is desirable to maximize the use of knowledge in organizations, while recognizing that there are substantial, largely human, barriers in its way.

2.2 The learning organization

The notion of the learning organization is of more recent origin. It emerged towards the end of the 1980s and is commonly attributed to the work of Senge (1990). The 'learning organization' is one "where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together" (ibid. p. 4). Like his predecessors, Senge underlines the importance of clarifying and understanding mental models for effective organizational learning. However, his perspective is more 'strategic' in that he assigns a strong role for the leader in building a shared vision and challenging prevailing frames of reference. The empowerment of employees in order to encourage individual professio-

nal development is also seen as crucial. Departing from the assumption that learning emerges from social interactions, the team or working group is put forward as a key learning unit in the organization. In this respect, Senge's work has paved the way for more action-oriented research on learning in organizations, notably Lave and Wenger (1991) and Wenger's (1998) studies of 'communities of practice'.

2.3 Organizational knowledge

Organizational knowledge as a subject of study has been around for a long time, with significant influence of 'classic' theorists such as Fredrick Hayek, Edith Penrose and Michel Polanyi (cf. Easterby-Smith & Lyles 2003 for a review). One of the foundational works within the economics perspective is Nelson and Winter (1982), which emphasizes the importance of tacit knowing as a basis for individual and organizational competence. In contrast to explicit knowledge, which can be articulated or documented with relative ease, tacit knowledge is based on personal experience and skills. It is much less easy to express and can only be transferred through socialization processes, such as jointly performed tasks, face to face discussions etc.

A practical application can be found in Nonaka and Takeuchi's (1995) account of "the knowledge-creating company". Key findings in their work include: the significance of national culture to understanding the construction and communication of knowledge; the importance of dialogue between the policy domain and the operational levels in the creation of knowledge; and the general insight that most dichotomies, such as tacit/explicit and action/thinking, are problematic to operationalize. Nonetheless, many of the developments within the stream have evolved around distinguishing and understanding different types and forms of organizational knowledge. Popular classifications are for example those of 'know what' (data/information), 'know how' (procedural knowledge), and 'know why' (understanding/wisdom) (Ackoff 1989); and the four dimensions of knowledge and awareness stretching from 'knowing what you know' to 'not knowing what you don't know' (Carayannis 1999).

2.4 Knowledge management

The notion of knowledge management has been formulated during the last few decades. One driving force behind the development of this approach has been consulting companies seeking to capitalize on the potential for information technology. The conceptual logic takes its point of departure from a neo-economic view of the strategic value of organizational knowledge and follows an instrumental and 'chronological' view of organizational learning. It refers to how organizations acquire, distribute, analyze, and store knowledge (cf. Huber 1991), often with an emphasis on getting the most out of tacit and codified resources. The integration of technological applications into everyday working procedures, as well as the explicit support of top management for the use of these tools, are often mentioned as key to the efficient implementation of knowledge management systems.

How organizations obtain access to their own and other organizations' knowledge, so-called 'knowledge sharing', has also emerged as an important area for research (see Cummings 2003 for a review). This literature focuses on aspects such as the form and location of the knowledge, the recipient's learning predisposition, the source's knowledge sharing capability, and the relationship between the source and the recipient as

important 'success factors'. Although the main focus remains on the development of technology for the effective handling of data, the recognition that knowledge transfer involves extended interpretation processes rather than simple information communication has led to a certain rapprochement between the knowledge management and learning organization fields. Knowledge management initiatives are increasingly seen as parts of larger organizational strategies aimed at creating climates and cultures that facilitate sharing and collective learning from experience (Pedler et al. 1991).

3. Empirical Findings

This section summarizes recent studies of knowledge and learning within the development cooperation sector. The main focus is on analyses that attempt to draw broad conclusions based on observations of different organizations. In addition, emphasis is given to studies which address the Swedish context. The review sections of Cummings (2003), Hovland (2003), Pasteur (2004) and Ramalingam (2005) were useful for the initial identification of relevant work. Subsequently, the theoretical framework outlined in the previous section was used for thematic organization of the chosen studies. A basic distinction is made between conceptual and applied studies, which are then classified in relation to their focus on process or contents (in line with Figure 1, above).

A first overarching observation is that research on development cooperation is largely applied and prescriptive, which is less surprising in light of the high proportion of consultancy-related reports over academic papers. A second observation is that empirical work often tries to combine knowledge and learning issues and/or mix influences from both literature streams. Nonetheless, the systematic comparison of studies according to their dominant theoretical traits points to a consistent taxonomy of practical investigation approaches. While analyses from an organizational learning perspective are principally concerned with systemic issues (often addressing the development cooperation sector as a whole), studies based on the learning organization concept frequently take the form of assessments of single development agencies' learning capacities. Whereas research influenced by the organizational knowledge literature elaborates on the roles of various actors in creating different types of development-relevant knowledge, the knowledge management stream generates appraisals of concrete initiatives and tools encountered in aid organizations. Using the theoretical framework proposed in the previous section, the empirical studies can be categorized as follows:

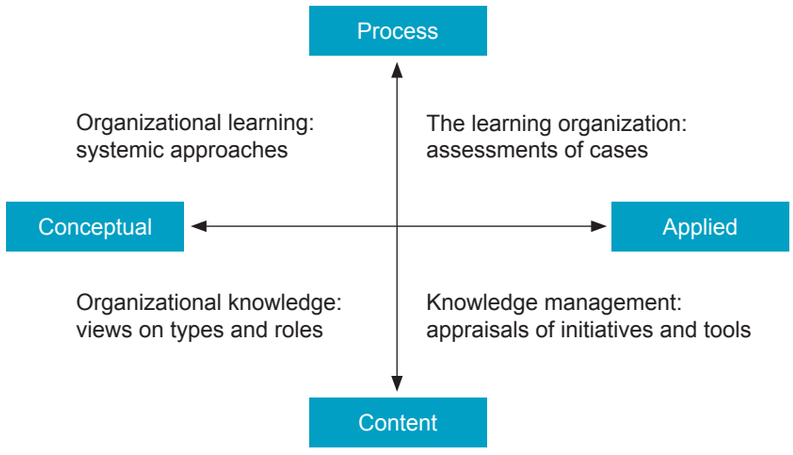

Figure 2: Main empirical directions of studies of organizational knowledge and learning in development cooperation.

The figure above forms the basis for the succeeding review sections.

One of the few conceptual treatments of learning in public, non-for-profit organizations (in explicit contrast to private firms) is Haas' (1990) account of models of change in multilateral institutions such as the UN and its associated bodies. According to Haas, learning in and by an international organization implies that the organization's members "are induced to question earlier beliefs about the appropriateness of ends of action and to think about the selection of new ones" (ibid p. 24). This definition is similar to Argyris and Schön's notion of double loop learning. The learning process is taken to mean how members of an organization arrive at a common understanding of the causes of a particular problem, and a shared understanding of appropriate solutions. Haas concentrates on the difficulties involved in bringing about such organizational consensus when success criteria are ambiguous, members have diverging interests, and power is unequally distributed. He emphasizes the role of expert-generated knowledge as a 'neutral' resource that can provide a basis for redefinition and reconciliation between clashing political objectives.

Ostrom et al.'s (2002) 'institutional' analysis of development cooperation approaches the problems of collective action from a similar theoretical perspective as Haas. Although not explicitly focused on learning, the study brings up a number of motivational and informational problems that hamper the realization of joint benefits, both inside and between development aid organizations. Analytical notions such as moral hazard and adverse selection are evoked to explain the tendency of actors to only communicate information that is likely to benefit them individually. A consequence of this behaviour is that decision-makers commonly have inadequate or partial knowledge about actions being taken, about the linkages of actions to outcomes, and about payoffs. This means that it becomes increasingly difficult to determine what 'really' works in practice, and to replicate positive experiences. Based on the aforementioned analysis, the authors propose a number of structural modifications through which a donor agency like Sida can seek to improve access to essential beneficiary-level information, and improve the capacity for organizational learning. One crucial element is the maintenance of close contacts between programme officers and actors at the operational level. Current efforts to decentralize management responsibilities to the 'field' are highlighted as a step in the right direction, while features such as the rapid rotation on overseas positions, lacking mechanisms for post-field knowledge transfers and growing proportion of temporary staff are mentioned as obstacles to enhanced organizational learning.

The concluding analysis in Carlsson and Wohlgemuth's (2000) collection of essays on learning in development cooperation inductively arrives at similar conclusions as the aforementioned studies. A number of systemic factors that the authors identify as particularly prominent in obstructing organizational learning are investigated: First, the ambiguity and contested nature of the official objectives of development aid constitutes a political constraint that makes it difficult for agencies to determine 'what really matters' and to develop a clear and focused sense of mission. Second, the unequal nature of aid relationships, where one party possesses the 'power of the purse' is seen to hamper critical dialogue and creating information bias. Third, the internal organisational problems of aid agencies stemming e.g. from the high centralisation of management and the narrow definition of job assignments. Fourth, the lack of capacities on the part of aid recipients. Fifth, the allegedly poor quality of knowledge gene-

rated by current aid evaluation systems (cf. section 4.4). In spite of these fundamental concerns, the authors note that development cooperation policy and practice has changed considerably in recent decades. The overall conclusion is therefore that learning does take place, but not to the extent that is possible or desirable.

3.2 The learning organization: assessments of cases

An early attempt to examine a development agency's capacity for organizational learning was made by the Swedish National Audit Office (RRV) in their (1988) report "Lär sig SIDA?" (Does SIDA learn?). The study identified personnel recruitment policies, promotions and rotation within the agency as important factors for learning. Among other things, the study noted a tendency to reward competitive behaviour over team work. This was seen to create pervasive incentives for knowledge sharing and transfer. The report also expressed concern that Sida's increasing use of consultants for technical and analytical work would drain the agency of expertise, a problem that was seen to be further exacerbated by decentralisation. It ascribed importance to management factors, pointing to complaints voiced by the staff that senior managers frequently did not have time to discuss all the options which might be raised by a project or a report. The lack of continuous feedback and a common view of what was 'good aid' was perceived to make it hard for programme officers to know what was expected of them to learn. In general, RRV suggested that there was a need to develop a homogenous and well-conceived vision about the development and valuation of competencies, and a proposal for how the organization could be (re)structured to create a better learning climate. To this end, RRV pointed out that Sida's various objectives were inconsistent. Notably, there was a seemingly paradoxical relationship between qualitative and quantitative targets ('disbursement pressure'). The report concluded that conflict between obscure goals was a possible source of severe learning blocks, and even cynicism, among the otherwise highly ambitious staff.

In the wake of the RRV report, several studies have attempted to analyse the learning process in more detail. One such study is Forss et al.'s (1998) essay, initiated by the Swedish Expert Group on Development Issues (EDGI) at the Ministry for Foreign Affairs. It takes its point of departure in a view of learning as a sequence of acquisition, distribution, interpretation and storage activities (cf. Huber 1991). On this basis, the authors identify structural, process related and cultural factors that impede efficiency in the aid administration context. A key finding is that the major weakness lies not in acquiring or documenting knowledge, but in making the organisations act on existing knowledge. Even though performance feedback is available, usage is often hesitant and piecemeal. The authors see one explanation for this in the overlapping character of many systems for information distribution and storage, which together create an abundance and overload of information that is hard for the individual to process and synthesize. Many structural aspects of work are also seen to negatively affect learning. Time is put forward as the most important constraint for the generation and application of new knowledge. Developing novel ideas and implementing them takes more time than adhering to existing routines. The benefits of new practices are also perceived to be uncertain and long term. Moreover, while there is considerable interest in learning from success stories, there is a general reluctance to revisit perceived failures in depth. The authors also express concern that the identification of 'best practices' is more frequently associated with influence from powerful institutions (the Govern-

ment, the World Bank, etc.) than the analysis of own experiences. Despite this, the study concludes that aid agencies seem to mainly learn internally. Although individuals speak of the principal importance of learning from contacts with partners in developing countries, in practice these contacts appear to be rather limited. The lack of access to external sources of competence is an important casual factor that impedes the re-thinking of basic organizational principles and values (double loop learning), while putting undue emphasis on the reinforcement of technical competencies (single loop learning). The risk is that aid agencies get increasingly better at implementing projects and programmes that are of successively decreasing relevance.

A series of studies based on case studies of specific learning activities within both public aid agencies and non-governmental organizations have complemented the above picture. For instance, the 2002 ALNAP Annual Review looks at knowledge and learning practices within the humanitarian sector. It identifies a range of problem areas, most of which are related to issues of structure and funding. Short term operational cycles, high staff turnover, low overheads and competitive behaviour between agencies are seen as barriers to learning across the sector as a whole. Suggested action points for change are emphasising the internal efficiencies of the organisations involved against the broader need of heightening accountability. On the other hand, attention is also given to the emotional difficulties of confronting the need to learn, which is especially difficult in humanitarian aid where accepting responsibility for a mistake also means taking responsibility for failing to save human lives.

The relevance of psychological factors is echoed in a recent IDS Lessons Paper (Pasteur 2004), which highlights the stage of (self)reflection in learning processes. Challenges like fear of exposing oneself and loyalty towards colleagues are brought up as impediments to productive dialogue about the organization's past, present and future. The author sees partial solutions in decentralized structures and flattened hierarchies and explicit reward for team-working. Decreased reliance on tools with a linear logic is also recommended to foster the necessary experimentation. The importance of a 'creativity-enhancing' organizational climate is also stressed in Cornwall et al.'s (2004) study of participatory learning groups at an aid agency (one again exemplified by Sida). However, the authors also point to the need of balancing creativity and flexibility with structure. Strong leadership as well as a clear specification of learning output targets are seen as crucial to the 'success' of a learning initiative, not at least to gain legitimacy for these kind of 'fuzzy' activities within the organization as a whole.

Ramalingam's (2005) comprehensive analysis of lessons from the implementation of knowledge and learning strategies in 13 development organizations (covering both public agencies and NGOs) synthesizes much of the previous literature in the area. One pertinent insight resulting from his case studies is that it is hard to add in knowledge and learning at the end of existing processes, especially if there are no incentives for this additional work. In the author's own words, "the 'add-on' air of knowledge and learning activities and the somewhat jargon-laden vocabulary does not appear to help build legitimacy, or assist prioritisation of knowledge and learning with core activities. This may in fact be the fundamental difficulty faced across all the organisations covered: the knowledge and learning function may be seen as competing internally with other approaches whose functions are geared towards different priorities" (ibid, p. 30).

Another finding is that the studied organizations face difficulties in assessing the knowledge and learning strategies developed. Narratives are a frequently used technique, but have a tendency of putting an overly positive gloss on results without identifying key areas for improvement. At the present, there is more emphasis on the potential of knowledge and learning, rather than on the tangible benefits it has already achieved. The report concludes that to improve incentives for uptake, an evidence-base is needed that clarifies the explicit and implicit cost-benefits of staff engaging in knowledge and learning activities and allows for cross-organizational comparisons of 'best practice'.

3.3 Organizational knowledge: views on types and roles

The relationship between knowledge and development has long been debated in the social sciences (cf. e.g. Cooper & Randall 1997 for a collection of essays from the fields of economics, anthropology, history, political science and public health). The issue was 'populized' among development cooperation practitioners by the World Bank in its World Development Report of 1998. In this study, it is argued that knowledge, rather than capital, is the key to sustained economic growth and improvements in human well-being. Two sorts of knowledge are identified as particularly and equally relevant: knowledge about technology, referred to as technical knowledge or know-how, and knowledge about attributes, meaning knowledge about products, processes, and institutions. The report outlines the harmful results of asymmetrical distribution of know-how (knowledge gaps) and incomplete knowledge about attributes (information problems) in developing countries. It concludes that it is foundational to the entire development enterprise to find ways of dealing with these challenges - although little is said about the World Bank's own role in generating knowledge about developing countries (Metha 2001).

Meanwhile, studies with an explicit focus on the development aid have largely been concerned with understanding what the alleged knowledge requirements imply for donor policies. A central research question is what is 'relevant' knowledge for development agencies who want to maximize their impact, and how this knowledge can be generated. While donors have increasingly come to present themselves as 'knowledge agencies' involved in 'knowledge-based aid', the underpinnings of these statements are often vague. In the main, they involve a change in discourse from emphasizing Northern knowledge transfer to putting more stress on joint capacity development with the South (King 2004). A frequently cited source behind the new approach is an exposé by the World Bank's former chief economist Joseph Stiglitz (1999) in which he argues to "scan globally, but reinvent locally" (ibid, p. 1). Three main theses support this claim: First, the idea that 'best practices' are rarely generalizable, but need to be adapted to local conditions and culture in order to be successfully adopted. Second, the view that practical know-how is largely tacit and needs to be transferred through 'horizontal' methods such as twinning, apprenticeship and seconding. Third, the belief that local adaptation cannot be done by passive recipients of 'development knowledge', but must be actively embraced by practitioners and policy-makers in developing countries. Implied counsel for development agencies is to give up their 'north-south' training ambitions in favour of a match-making, facilitating and brokering role that supports 'south-south' knowledge flows.

At the same time, new ideas about knowledge-based aid have been sourced very much from the corporate sector in North America and in Europe. Accordingly, there has been a powerful tendency for the emphasis to be on the capture, synthesis and more cost-effective utilization of the agencies' existing knowledge bases rather than on the generation of new knowledge. King (2004) argues that for the first several years of development organizations seeking to become knowledge agencies, the predominant focus has been on the development of the knowledge of their own staff rather than on knowledge development in recipient organizations. In line with Stigliz' reasoning, his view is that a continuation along the present internal trajectories would be counter-productive. It hinders the knowledge vision from being realised in a widespread and systematic manner, and may in a longer perspective even contribute to a widening of the knowledge gap between developed and developing countries.

While agreeing in principle on the merits of 'localized' knowledge, other analysts have been more ambivalent on how development organizations should go about to strengthen their ability to 'do good'. Hovland (2003) distinguishes between 'bottom-up' and 'top-down' strategies, the first of which emphasizes knowledge from the field, while the second stresses knowledge of higher level negotiation and policy making processes. The author argues that agencies need to balance both strategies in order to gain both local legitimacy and influence at the global level. The bottom-up approach means that 'learning by doing' has to be appreciated by staff at headquarters, while the opposite scenario requires people 'on the ground' to be susceptible to more generalized and conceptual lines of argument. This situation, however, brings with it much potential tension between different units of the organization. It may also lead to opposing conclusions as to whether decentralization is positive or negative in its impact on organizational knowledge systems. On the one hand, there is concern that a weakened central capacity may negatively affect e.g. the ability to do policy research. On the other hand, decentralization is seen as a possibility to draw upon rich sources of knowledge from a wide range of development contexts (cf. Forss et al. 1997). With the present emphasis on partner country 'ownership' of development cooperation initiatives, the pendulum has swung towards the latter approach. To varying degrees, practical reflections of this rhetorical movement can be noted in agencies' increasing delegation of responsibilities to their field offices, and in concurrent attempts to localize more of the policy dialogue (e.g. on coordination and harmonization) to recipient countries.

3.4 Knowledge management: appraisals of initiatives and tools

Studies of knowledge management within development aid have been much centred on the implementation and use of specific tools and systems for feedback from operations. Examples from Swedish development cooperation include Carlsson et al.'s (1997; 1999) critical examinations of the evaluation system at Sida. The authors argue that evaluations often fall short of their purpose to transform knowledge from experience into improved practices for several reasons: First, the signals from evaluations are weak insofar that the quality of reports fall short of expectations. There is often a lack of practical focus at the level of individual project or programme assessments. Moreover, the depth of analysis is sacrificed in favour of a tendency to answer too many questions in too short a time. Consequently, recommendations are often found to be vague or ambiguous, and hard to act on. Second, there are few examples of evaluations

actually contributing something original in terms of knowledge. Neither the issues addressed, questions posed nor answers provided are normally perceived as new by the stakeholders involved. The root to this problem is to be found in the management of the evaluation process, notably the routine initiation procedures and the 'shopping list' formulations of terms of reference. Third, evaluation results appear to frequently serve other purposes than triggering responsive action. Using evaluations for legitimizing decisions already taken is common, as is using evaluations for ritual flag waving (cf. Vedung 1995 for a classification of evaluation uses). Forth, evaluations are found to be a concern for a very limited proportion of all those who should have an interest in a project and are affected by its outcome.

The critique that knowledge management systems do not enhance partnership, dialogue and ownership is repeated in Hanberger and Gisselberg's (2006) recent study of Sida's so-called Management Response System, a newly developed tool for promoting learning and improving the administrative procedures for evaluations. By requiring managers to provide written commentaries on the quality and recommendations of evaluations, the system is intended to ascertain that findings and conclusions are given due consideration and are acted on. The evaluators conclude that although the assumptions and design of the Management Response System are reasonable and consistent to attain the desired outcome of better documentation and adding structure, they are not quite consistent with the objective of organizational learning. Main reasons for lacking effectiveness include the slow implementation pace and the weak integration with existing fora of decision-making. Moreover, the system provides no formal mechanism for feedback from stakeholders outside the organization. A suggestion is to develop a 'Partner Response System' with the added purpose of reaching 'agreed consent' on evaluation results.

Studies of broader knowledge management initiatives in development organizations include APOC's (2003) summary of 'best practices' in knowledge management at the World Bank. The report examines the enactment of the plan launched by president Wolfensohn to transform the World Bank into a "Knowledge Bank". It emphasizes the importance of selecting and implementing technology as part of a larger, systematic reform strategy. Another key tenet is that senior executive support alleviates the barriers to sharing knowledge by encouraging 'appropriate' behaviour and embracing new approaches. Moreover, knowledge must be embedded in employees' work flow so that it can be captured, exchanged, and reused during daily responsibilities. The establishment of cross-functional thematic networks, notably in the form of electronic communities of practice, is put forward as a main instrument in creating and sharing expertise (cf. also DFID 2000).

Carayannis and Laporte's (2002) case study of organizational change within the Education Sector of the same institution largely confirms the above view. The authors furthermore point to the need for better assessment of the effectiveness of knowledge management programmes, and ask the question whether appropriate metrics could enhance implementation. They identify a particular challenge in identifying measurements "that serve a purpose and do not become the ends rather than the means" (p. 23). Thereby, they are implicitly addressing the question how much knowledge management gains from being made explicit, and how much it actually needs to be mana-

ged. King and McGrath (2003), who compared the approaches to knowledge sharing in four agencies (World Bank, DFID, JICA, Sida), found evidence of two rather different positions. On the one hand, an emphasis on informal, human interaction at the heart of knowledge sharing, seeking to do little to interfere with its operation. On the other hand, a view that as much tacit knowledge as possible should be captured and codified, stressing the importance of doing knowledge sharing well and seeking to achieve this through formal structure and measurement. In many agencies, there seems to be a conflict between the belief in information accumulation as a value-enhancing activity, and worries that the new systems developed for this purpose may be more likely to gather unsynthesised and unsystematic chunks of data that are an insufficient basis for learning and transfer across contexts.

4. Analysis

This section assesses the empirical literature on knowledge and learning in development organizations against the background of the theoretical review presented earlier. While acknowledging the value of existing studies in documenting current knowledge and learning initiatives across a wide range of organizations, we argue that future analyses could be significantly improved by addressing some basic methodological issues. Existing empirical studies of knowledge and learning in development cooperation provide good descriptions of problems and preconditions, but are weak at evaluating concrete outcomes. This section will outline four reasons behind this deficiency:

i. insufficient differentiation between the causes of organizational change;
ii. insufficient differentiation between the effects of organizational change;
iii. insufficient discussion about the normative assessment of results;
iv. insufficient consideration of the intertemporal relationships between inputs, outputs, outcomes and impact when measuring change.

In simple terms, we argue that a more systematic consideration of what knowledge or learning aspect is examined and how it can be documented is instrumental to making findings more evidence-based and relevant for both policy-makers and practitioners. Suggestions for how to address the shortcomings of previous empirical work are presented in the succeeding sections. Implications for the design of future evaluations are discussed in the concluding part of this paper.

4.1 Types of causes

Empirical work on knowledge and learning in development cooperation are routinely ambiguous as regards the causes of studied change processes. Except for evaluations within the knowledge management vein, where there is typically a focus on one or more specific initiatives or tools, studies tend to be imprecise about sources. Notably, future studies would benefit from clarifying their interest in exogenous or endogenous change, i.e. whether the triggers to learning will predominantly be sought in changing environmental conditions, or in more conscious and wilful internal reform initiatives (cf. Argote et al. 1990; Wilson 1992). The proposed distinction is relevant for two reasons: First, because the environmental complexity and turbulence endemic to development cooperation contexts makes it particularly challenging to distinguish a 'planned' learning effect from other change processes. Therefore, it is essential to clarify to what extent the examined processes can be seen to rely on pre-existing organizational goals and intervention rationales (in evaluation language: 'program theory'). Alternatively, to identify and describe which external or ad hoc signals are deemed influential for that being studied. Second, a distinction between exogenous and endogenous sources of learning raises the question of 'who is learning from whom?'. As the preceding empirical review has shown, the roles of different actors in creating, transmitting and appropriating development knowledge is a central, but controversial, issue. To

date, the 'power perspective' has received only limited coverage in studies of organizational learning within and among aid organizations.

4.2 Types of effects

How to take the effects of learning processes into consideration appears to be often disregarded in practical assessments of development cooperation organizations. Previous studies are often vague about what changes are of interest: changes in operational output, in policy content, or in both. A suggested development is to explicitly discuss which importance is ascribed behavioural vs. cognitive developments. The first concept denotes changes to action; the second refers to changes in attitudes and beliefs. The choice of focus has methodological implications. For example, behavioural change is commonly measured by 'hard facts' such as the allocation of resources, usage/participation statistics and the like, whereas the documentation of cognitive change involves qualitatively assessing personal attitudes about the organization of work processes, information flow, management support, feedback and reward systems, and climate and culture (cf. Fiol & Lyles 1985). Given the strong normative trends in development cooperation doctrine and the associated tendencies to 'mainstream' terminology, an added challenge is to distinguish rhetoric from 'real' values when attempting to analyse cognitive change.

4.3 Normative assessment of results

The question of which learning results are to be considered valuable is often poorly treated in the empirical literature. There are a number of issues which should arguably be addressed more explicitly than has been the case to date. A first question is whether cognitive and behavioural changes have to improve performance before they are regarded as reflections of organizational learning. Alternatively, whether all changes in thought and action, irrespective of their positive or negative impact, are included (cf. Miner & Mezias 1996). The position adopted has implications for at which 'stage' in the effects hierarchy it is most relevant to measure learning (cf. the concepts of output, outcome and impact frequently referred to in evaluation contexts). A second question, which follows from an ambition to provide normative recommendations, is what standards are employed to make a judgment of 'good' results? The complex goals of development cooperation preclude the establishment of a single, universal benchmark of value (such as economic profit). Studies should therefore benefit from making explicit which criteria are used, and where they originate. At present, many evaluations of knowledge and learning in aid organizations retain a focus on individual competitiveness adopted from the literature on commercial organizations (as well as an assumption of internal consistency about how to achieve this goal). Although aid analysts agree in principle on an interpretation of 'performance' that involves improved cooperation and coordination across the aid delivery system and learning between different actors, empirical assessments of these kinds of results are still rare.

4.4 Intertemporal documentation challenges

The study of change processes by definition involves repeated observations of developments over time. However, current work on knowledge and learning in development cooperation is predominantly based research strategies implying case selection and assessment 'after the fact'. (Cornwall et al. (2004) and Lockheed (2004) are notable for explicitly discussing 'sequential' methodologies from their respective positions

on the quantitative-qualitative spectrum). An ex-post approach is problematic for two interconnected reasons. First, it is likely to lead to 'success bias' in the examined processes (i.e., an undue emphasis on positive experiences and simultaneous neglect of perceived failures). Second, the tendency of individuals to post-rationalize behaviours associated with success risks further tilting the conclusions by way of concealing resistance to the prevailing outcome. Though evaluations must often be designed according temporal, monetary and/or documentary constraints, these pragmatic concerns must not outrule the consideration of appropriate baselines. One suggestion for future studies of aid organizations is to revisit and update selected background materials of earlier work, thereby allowing for longitudinal approaches to be implemented in a resource-effective way. Potentially, this would facilitate the needed expansion from situational accounts to analysis of learning outcomes.

5. Implications for Future Studies

This paper has discussed the need for a more systematic approach to the evaluation of knowledge and learning in aid organizations. The topics raised reflect the evaluation context in which this report is crafted. With SADEV's overarching objective to contribute to increased efficiency in Swedish development cooperation follows a particular interest in causalities and 'instrumental logic'. Accordingly, we have stressed present shortcomings related to the insufficient differentiation between causes of organizational change; the insufficient differentiation between effects; the insufficient discussion about normative results assessment; and the insufficient consideration of intertemporal documentation challenges. Despite the terminology invoked, we believe these to be relevant concerns for most studies of organizational knowledge and learning regardless of whether their research interest lies in predictive modelling or in process description. (In the latter case, a clear definition of 'start' and 'end' points should facilitate the identification of intermediary steps). The below figure recapitulates the main points raised in the preceding sections.

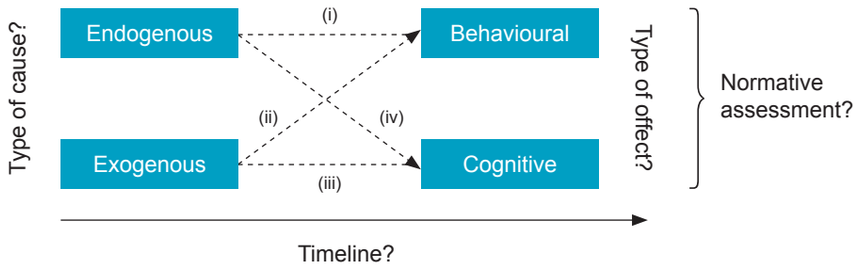

Figure 3: Important methodological considerations in the evaluation of organizational knowledge and learning.

Taken together, the considerations made by individual analysts and evaluators as regards the matters of causes and effects can be expected to have implications for research design. Different choices will require different types of data and variation in what time frame and what unit of analysis is considered appropriate. Methodological reflection can also be seen as an inductive way to approach the assessment of different types of learning processes as suggested by the theoretical literature. The table below demonstrates the diversity in approaches by exemplifying how evaluations assessing relationships of types (i) through (iv) could be designed.

	Learning aspect in focus	Evaluation questions	Unit(s) of analysis	Time perspective	Potential data sources
(i)	Rates and types of use	To what extent are tools for learning used, and how are they used?	Technical systems, evaluation reports, policies/ guidelines	Short	User statistics, surveys, interviews
(ii)	Immediate responses to performance feedback	What types of results information triggers what kind of actions? What kind of feedback is conductive to the definition of a project as a success/ failure?	Individual projects	Short	Monitoring/rating data + resource allocation decisions
(iii)	Gradual rethinking of operational strategies	How have intervention approaches within similar operational areas changed over time? How have experiences about previous successes/ failures been incorporated into the design of new projects?	Sequential projects, e.g. within a selected sector or country	Medium	Policy documents, project assessments + project portfolio composition over time
(iv)	Profound changes in attitudes and beliefs	How have the goals and rationales of development cooperation evolved over time? How have the conceptions of what is bad/good aid changed?	The whole organization, or a selected unit	Long	Comparative surveys of attitudes over time

Table 1: Examples of different approaches to the evaluation of organizational knowledge and learning.

Another topic raised by this paper concerns the scant treatment in existing studies of knowledge and learning in development cooperation of systemic power structures and differing incentives across the aid delivery chain. The neglect of these issues is partly a result of the commercial origins and orientation of the theoretical literature, presuming a focus on individual competitiveness as the principal goal of organizational learning activities (as well as an assumption of internal consistency about profit maximization as the key means to achieve this goal). One of the largest current challenges of practitioners working with organizational development in aid organizations is to expand the view of learning from an internal to a systemic perspective and to reconsider the basic question of who is to learn what from whom? While it is out of scope of this review to provide operational advice about how to advance this transition, a tentative proposition is that an introduction of 'sensitizing concepts' in the evaluation of organizational knowledge and learning may help to (re)define strategic focus. Rather than investigating organizational to explicate the underlying purpose(s) of the examined processes. Furthermore, the deliberate choice of 'boundary-spanning' concepts like 'harmonization' or 'dialogue' would be one way to approach previously neglected systemic aspects of knowledge and learning in development cooperation.

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7. End-notes

[i] This kind of critique is not unique to the development cooperation context. See Lähteenmäki et al. (2001) for a review of general methodological problems in organizational knowledge and learning research.

[ii] The concept of paradigms was introduced by Kuhn (1962) to denote the philosophical frameworks informing and guiding academic research. The use of quantitative approaches is often associated with a functionalist/positivist paradigm which assumes that there is an objective, social reality which can be empirically analysed and understood through the application of scientific methods. Conversely, the use of qualitative approaches is commonly coupled with an interpretative/constructionist paradigm which assumes that individuals and their interactions subjectively create social realities, which in turn can be interpreted and described by researchers (cf. Burrel & Morgan 1979).

[iii] Even though the term "learning organization" is used by March (1988), it is without the normative implication that the term subsequently adopted following the work of Senge.

[iv] The potential for learning in development cooperation is discussed in more positive terms by Roper et al. (2003), who argue that development practitioners should be especially good at embracing the idea of organizational learning since there is a tradition of belief in the transformative power of diverse forms of education. A second aspect of organizational learning theory that practitioners are said to feel comfortable with is the emphasis on embracing change. Most people join the development field because they want to change the status quo, whether in a relatively restricted area of specialization or in a more profound way, such as addressing the root causes of poverty. A third aspect with which many practitioners will identify relates to the focus on changing internal structures and practices that inhibit learning, as undertaken e.g. through 'institution building' or 'organizational capacity development'.

[v] As Hovland (2003) points out, similar internal tensions should be faced by MNCs and other divisionalized organizations. However, related challenges are not much discussed in the learning literature, which tends to see the organization as an harmonious entity where all sections and staff are willing to learn together towards a common goal.

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