

BECOMING A LEARNING ORGANISATION: THE PROCESS AT AN HIV/AIDS RESEARCH UNIT IN SOUTH AFRICA

Andrea van der Merwe and Tim Quinlan¹

INTRODUCTION

Universities are institutions in which society encourages a learning culture. This case study describes the experience of the Health Economics and HIV/AIDS Research Division (HEARD) at the University of KwaZulu-Natal in its journey to internalise a learning *culture* in such a way that it could become a learning *organisation* with a strong focus on networks, and offers a strategy for developing social capital in the workplace. The case study will help you understand in a practical way how connectivity can be built within a team, and between one team and another; and how relationships can be strengthened in the process. The case study provides a very clear demonstration of the success that can be achieved through an approach that focuses on “who can I do this with?” rather than on “how can I do this?” It also shows how an appreciative approach can be put into practice and brings home the value of an emergent approach to work in a context of change. The last section of the case study describes the lessons learnt by HEARD.

HEARD is self-funded unit within the University of KwaZulu-Natal. Its purpose is to do research that informs the design and implementation of strategies and programmes to curb the HIV/AIDS epidemic in Africa. This is a complex challenge as the demand is for the unit to conduct sound research, influence policy makers to use the results, and to suggest innovative and sustainable solutions to curb the spread of the disease. Underlying this challenge is that of balancing the demands of research, advocacy and support with the way these activities are translated as practical ‘products’ and ‘outcomes’ in the business and annual work plans that HEARD’s funders and donors use to measure its progress.

Put differently, these plans present HEARD’s work as following a linear, mechanical logic, like many traditional projects. However, much of the actual work in research, in influencing decision-makers and developing solutions doesn’t follow a straight line. Researchers need to follow the rules for doing rigorous research but, equally, they need to be multi-skilled, flexible and creative in how they communicate their research, how they interact with the people they seek to influence and how they devise answers.

HEARD understood a few years ago that it needed to extend its learning culture and become a ‘Learning Organisation’ if it was to be successful in balancing these demands, effective in an environment where the future is not predictable, and able to adapt as circumstances change. Since then the leaders has taken some practical steps towards this vision. In 2008 HEARD engaged the services of the Learning Company to further refine its efforts towards embedding learning as a key capacity in the organisation.

¹ Andrea van der Merwe is a consultant at Kessels & Smit, The Learning Company, a global consulting and applied research network, focused on learning and organisational change. Professor Tim Quinlan is the Research Director of the Health Economics and HIV/AIDS Research Division (HEARD), a self-funded, applied research unit at the University of KwaZulu-Natal, Durban.

THE LEARNING COMPANY AND HEARD

HEARD approached The Learning Company with an understanding that traditional training alone could not help it achieve its objectives. HEARD needed to complement technical training and content focused training by making learning a more integral feature of daily work. The staff, researchers and administrators, need to work closely together and learn from each other in ways that leave them with increased capacity and skills, something that cannot be imparted in a 'training course'.

The approach used by The Learning Company is based on the wisdom that the foundation for solving difficult social problems lies in collaboration and co-creation. It offers a way of learning that appears to be less structured than 'training'; the focus is on dialogue and connecting on work specific topics with the help of facilitators. In this way, learning is used as a 'bridge' between working and innovating. Learning becomes not only the thing that organisation do as a product or output for the outside world, but also a way of being with each other and their stakeholders through open discussion and tolerance. The two drivers towards a Learning Organisation which were used for the capacity building approach at HEARD were:

Definition: A Learning Organisation can be defined as an organisation, structure, process or network where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspirations are set free, and where people are continually learning to see the whole together.

Peddler et al. (1991:1)

History: The idea of a learning organisation and the term 'Learning Organization' was phrased by Peter Senge in his popular book 'The Fifth Discipline: The art and practice of the Learning Organization.' Published in 2000. One of the key ideas of the Learning Organisation is the understanding that any organisation can be viewed as is a living organism or system. This characteristic means that it is also able to learn. (Peddler, Burgoyne & Boydell, 1991:2)

1. Connect via the network

The principle of connecting via the network, is based on the understanding that organisations, communities and societies can be likened to a web of people and relationships. Due to the number of combinations of results possible, these can be called complex. The idea of 'Connecting via the network' requires the individual to look wider than just themselves as singular individuals within a department or their organisation, and to focus on creating strong learning based relationships within and beyond the organisation rather than presuming they have 'answers' by virtue of their profession, expertise or experience. The 'answer' comes out of connecting with different parts of the network, helping to unlock the creativity of the collective, while at the same time building strong and tolerant relationships.

Definition: A network can be defined as an interconnected group of things or people. In a social context, the network refer to a group of people (or organisations) called 'nodes' who are connected through relationships called 'ties' who remains in informal contact. The people are connected through mutual interests such as friendship, financial exchange, beliefs or knowledge.

2. The Appreciative Principle

This principle can be described as 'what you focus on, will grow'; the focus being on what is working well with individuals and in the organisation and, in turn, in society. In other words, the emphasis is on potential and solutions rather than problems, on finding positive and energising starting points from which to engage challenges to the organisation and, in research, to society.

Using this principle, positive patterns (things which are happening already that we like) are strengthened, while negative patterns (things we don't want to encourage) get no attention, and therefore are not encouraged.

Using these two drivers, three simple stages of work were planned:

1. Enabling individuals to become aware of the web of relations around them ('your network')
2. Map the network of relationships and their impact and meaning ('social capital')
3. Build and strengthen relationships using appreciative methods

The capacity building work involved two different groups of employees at HEARD over a period of 6 months. A facilitator, skilled in working in the interpersonal context, with a strong emphasis on appreciative interaction worked with the participants in regular sessions. These sessions tended to be no more than 3 weeks apart in frequency in order to maintain momentum of change, while allowing ample time for participants to implement and try out new ways of doing and being.

Researchers: Learning through networks

Researchers have to do meaningful academic research which at the same time needs to be practical and linked to real problems. To be effective they need to be skilled in their interactions with different people they encounter in the course of their work. These range from colleagues on collaboration, or support staff on daily matters, to external parties who they need to influence and with whom they communicate. These groups of individuals constitute the individuals' and the organisation's network.

Using the three stages outlined above, The Learning Company facilitators worked with small groups and individual researchers in a variety of settings using real problems and situations in their work. One of the methods used consisted of a series of questions which had the intent of strengthening the networks of the researchers:

- * What is the work challenge you are dealing with right now?
- * Who are the people involved in this situation and what is your relationship with them?
- * Which other people can you see on the edge of this situation, and who could you invite to work with you on this?
- * How can you look at this situation appreciatively, in other words, what about the people involved do you like, and connect with? What about the situation is working?
- * Which relationship can you strengthen, and how will you do that?
- * How can you connect with someone in this situation on the basis of mutual attraction, or on common goals?
- * What is it that you can do next do make this connection?

*One researcher says:
"I had a very 'difficult' relationship in one of my projects. The facilitator worked with me to look at the problem in different ways, coming from a more appreciative approach. I can now see many other options of how to proceed, all of which will help me to resolve some of the difficulty within the relationship"*

It is important that this process is facilitative at first, ensuring that it is appreciative by focusing on what is already there, finding the strengths and potential, dreaming of what it can be, taking steps to make it happen and regularly checking in on what new things are working based on the action taken.

Project Support Staff: A Strong Connected Team

The project support team in HEARD has the role of managing the administrative and logistics operations of HEARD. It is important that the team works well together as a cohesive group, in a high-stress environment. The team has researchers as their internal clients and needs strong and positive relationships with individual researchers to achieve optimal results in research projects.

When the work started with the team, there was not a particular positive team culture at work in the team, and relationships with researchers were, at best, strained. Thus, the work with project support staff focused on strengthening the relationships within the team, helping to build confidence in their own abilities, and then connecting and strengthening relationships with other parts of the organisation. The work was done in small groups and individual coaching conversations. The first exercise or ritual introduced to the team was a weekly team session, which proved to be very successful.

This very simple tool is much more than another team meeting dealing with problems and more akin to a team support session. It encourages the team to connect on a more personal level and become more appreciative of each other and focus on what is working in the team. It is a simple process where each team member is encouraged to answer questions in turn, keeping it as real and personal as is comfortable (i.e. not just focused on work, but also on personal life and relationships at home and work). The following questions were used:

- * What is working for you today? What do you appreciate?
- * Who in the workplace do you appreciate and why?
- * What is not working? What needs doing?
- * How are you feeling right now?

The facilitator led the first few sessions, but soon the team manager took responsibility to lead this to support the team to connect and build relationship within and without.

Once the relationships in the team were stronger and feeling more cohesive, the facilitator turned the focus outwards. The next step was to connect and strengthen relationships of the team members with other staff in the organisation. Specific attention were given to relationships with researchers who the team's internal 'clients'. Everyone in the team got a relationship building assignment. The assignment was to strengthen a particularly difficult or disconnected relationship, in an appreciative way. The assignment questions were appreciative and connecting questions, used by the team to start changing these relationships.

One support team member shares:

"There has been a major change in terms of the way we work amongst us. Our communication is much closer. Since the previous session we are speaking the same tongue and language. I feel great about it. You feel free to talk, without having fear and can address issues without fear. Every Monday we have a check-in, we express and say what we appreciate, what's working and what not working, and solutions. We talk about how we feel about work. This has had a positive impact, especially when it comes to our performance. Communication has become a tool, in every situation."

The work with the two groups was done over a period of six months, to help the change to be sustainable and maintainable. Using the two drivers of 'Connect via the Network' and 'The Appreciative Principle' helped to create simple and practical ways for HEARD employees to practise being part of a learning culture and moving towards becoming a learning organisation.

LESSONS LEARNT ON CREATING A LEARNING CULTURE

There is value in building strong social capital between individuals

We found that employees that have been part of the process took more initiative in connecting with each other (constantly strengthening the internal network), and were more pro-active in resolving disputes and conflicts that inevitably arise in relationships. It certainly helped support staff to interact more confidently with different parts of the organisation, knowing that everyone is connected and that each action has an impact. The big lesson was that the smallest improvements in relationships can make a big difference over a period of time in a team and in an organisation as the ‘social capital’ in the ‘ties’ of the network start to accumulate.

Appreciative relationships give energy for a teams or organisations to connect internally with more enthusiasm

Focusing on the positive and having an appreciative focus was easier with support staff who responded to the idea of connecting with each other as a team more easily than did the researchers. Due to the nature of researchers’ work which is often quite solitary, researchers needed to be conscientised about their mutual dependence and the value of team work in helping the organisation achieve its aims. Using the appreciative principle, activities had to be found that would inspire energy and enthusiasm among researchers. Some of the more successful ideas for HEARD were a ‘manuscript club’ where researchers constructively review each other’s draft written work, and a more formal mentoring system. In the mentoring relationship both parties agree to nurture the relationship through focusing on the personal aspects of working in a professional research organisation.

‘Learningful’ conversations lay the foundation for self-reflection

The weekly team sessions with support staff introduced ‘learningful’ conversations as a tool. These conversations are based upon simple processes and rituals which encourage self-reflection, helping individuals to learn about themselves and others. These conversations helped expand individual’s mental models and beliefs about what they each can do in the context of the team and what the organisation is capable of achieving through self-reflection and team learning. Teams and individuals don’t naturally have these conversations in the workplace as they are seen as less ‘serious’ and not directly linked to the work content.

The value of networks and conscious networking stimulation

The scientific use of networks in designing and doing projects has become an important component of research designs to solve complex social problems. An understanding of the importance of building relationships supported the organisation’s external efforts to create and sustain various networks throughout and beyond Africa. These external networks are essential for the organisation to achieve the goals it has set itself and, of course, to retain the support of funders.

One exercise drew researchers from African countries involved in a collaborative project with HEARD into the mentoring programme. As a result this partnership established a relationship with an important regional body, the HIV/AIDS secretariat of the Southern Africa Development Community. Another exercise was a ‘network project’ to draw and map the networks of employees internally and externally on a regular basis, in order to consolidate the learning gained

about networks. These examples show how the internal learning at HEARD further complements the formal research work it does.

Communicating ‘science to society’

An intrinsic feature of becoming a learning organisation for HEARD has been re-thinking how it communicates itself and its work. ‘Communications & marketing’ cannot be seen as separate to research. For example, the translation of scientific reports (after research is completed) into plain language and repackaging into different forms to reach different readerships has to become an integral part of the research. It needs to begin almost at the start of a project with both researchers and the communications co-ordinator learning together ways about opportunities for communicating the aims, values and purpose, and in due course, results and ramifications as they arise. It needs to happen before completion of a project report and the writing of scientific articles. This inevitably requires experimenting with different media and ways of presenting research work. In 2008 there was already evidence of that in the use of DVD film, a photo-journalism exhibition, and consideration of using ‘You-tube’.

Challenges

There is one fundamental challenge that a research organisation has to face when it comes to the implementation of a learning culture. This is the tension between the rigour required in the design and practice of science and the creativity and flexibility that a learning culture inspires with regard to the use of research work, ideas and projects.

On the one hand, the practice of science directs researchers to follow a seemingly straight and pre-planned path with defined targets in terms of translating an idea into a proposal, followed by operational planning, time-defined activities during implementation of research and leading through to analysis, report writing, and disseminating results in the form of a published article or more. Once that is all done, convention has it that other uses of the research can begin.

On the other hand, a learning culture inspires using and creating opportunities to learn and experiment with different facets and components of a project as it proceeds. In practice, this often leads to deviation from planned activities. It also means searching for ways to be more effective by experimenting with different ways of communicating and engaging with people that who need to be influenced or to take an interest in the research. Accommodating an experimental outlook – encouraging researchers to take risks - requires them to be very familiar with the underlying logic of a learning culture, in order to answer questions and to counter criticism that inevitably comes from those with a more traditional or orthodox understanding of science.

CONCLUSION

HEARD chose to define itself as a learning organisation partly for an obvious reason: it works to find solutions to the unprecedented global tragedy that is HIV/AIDS for which there are no obvious, immediate solutions. A less obvious reason was that the HIV/AIDS pandemic, like other major global challenges such as environmental degradation, has begun to make people realise that the absence of solutions means that society must, as a starting point, change its perspective on how to deal with these challenges. One step in that direction was the realisation across the world that no single agency could find or implement solutions by itself; collective and collaborative efforts were essential. For HEARD, this is the key to its decision to inculcate amongst staff the value of networking and networks which characterise learning organisations.

Hidden within the decision to become a learning organisation was the fact that HEARD works in a rapidly changing environment for research. Anti-retroviral treatment (ART) therapies have improved markedly since the 1980s. There are successful efforts to prevent the spread of HIV in

different populations alongside more and more people 'living positively' because they know it is a manageable chronic illness. Furthermore, political interests change all the time. South Africa has witnessed the years of 'Mbeki's denialism' and, subsequently new hope of a more systematic national effort to confront HIV/AIDS. This is not to deny that many people still become infected and die needlessly. The point here is that a research organisation like HEARD has to be capable of adapting to ever changing situations, indeed, to stimulate changes to how society confronts HIV/AIDS. That capability depends on staff acquiring skills that cannot be found in training courses; hence, the endorsement of methods which focus more on collaboration and co-creation, such as small group work and individual coaching and mentoring.

Inculcating a learning culture within the organisation takes time and patience. The means are simple but appreciation of their significance is a process that requires commitment by management of an organisation to capitalise on progress. In HEARD's case, a specific internal project to map and assess the internal networks of staff as well as the organisation's many relationships with other organisations has been initiated. The internal mapping is designed to complement other team work building initiatives by drawing the attention of researchers in particular to their mutual dependence on each other and support staff. The mapping and other initiatives cannot be once-off events. The awareness of the impact of appreciative relationships and a focus on supporting ongoing learningful conversations within and between teams cannot be neglected. All of these help staff and the organisation as a whole to locate itself in an ever-changing environment for research and for influencing the design of solutions to the HIV/AIDS pandemic. A sound understanding of the nature, the weaknesses and strengths of the networks will also help the organisation to see opportunities for improving the positive outlook and reach of the organisation. Thus, becoming a learning organisation helps the organisation to be more sustainable and impactful in the bigger health system.

Published in "Developing Capacity for Health: A Practical Approach" by N. Coulson et. al. 2010. printed by Heineman