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Facilitation for change: Triggering emancipation and innovation in rural communities in South Africa

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1 INTRODUCTION.....	2
2 THE CONTEXT OF FACILITATION FOR CHANGE: THE PARTICIPATORY EXTENSION APPROACH (PEA).....	2
3 OPERATIONALISING PEA IN COMMUNITIES- THE PEA LEARNING CYCLE	3
4 THE INTENTION OF FACILITATION FOR CHANGE IN THE COMMUNITY.....	4
5 SOME METHODS AND TECHNIQUES FOR OPERATIONALIZING F4C.....	8
6 COMPETENCIES REQUIRED TO PERFORM F4C.....	8
6.1 COMPETENCIES REGARDING VISION AND VALUES FOR ONESELF AND FOR DEVELOPMENT	8
6.2 COMPETENCIES REGARDING PERSONAL DEVELOPMENT ASPECTS	9
6.3 COMPETENCIES REGARDING FACILITATION	9
6.4 COMPETENCIES REGARDING CONCEPTUAL AND METHODOLOGICAL ASPECTS.....	10
7 HOW TO DEVELOP THESE FACILITATION COMPETENCIES?.....	11
7.1 ORGANISING THE LEARNING, FIELD PRACTICE AND MENTORING	11
8 GOING TO SCALE WITH FACILITATION FOR CHANGE.....	12
8.1 HORIZONTAL EXPANSION OF PEA.....	12
8.2 VERTICAL INTEGRATION / INSTITUTIONALISATION	13
9 MAJOR LESSONS AND INSIGHTS.....	14
9.1 LESSONS WITH REGARD TO THE FACILITATION FOR CHANGE.....	14
9.2 LESSONS WITH REGARD TO THE FACILITATION OF COMPETENCE DEVELOPMENT	14
9.3 LESSON WITH REGARD TO GOING TO SCALE.....	15
9.4 LESSONS IN TERMS OF INSTITUTIONAL RESPONSE TO THE SCALING PRESSURE.....	16
10 CONCLUSION: WHAT DOES ALL THIS MEAN FOR THE CONTEXT OF PARTICIPATORY / INNOVATION SYSTEM DEVELOPMENT?	16

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1 Introduction

Successes of participatory approaches have been reported and celebrated over many years. However, little attention has been given to the role of facilitation in triggering the change processes. The deep dimension of the concept 'facilitation' is often underestimated and its articulation has not yet evolved to an extent that it has a common meaning. In our observation, the word is used in different situations ranging from 'bribing', 'paying per diems', 'chairing' meetings to facilitation as a means for stimulating fundamental change in individuals and organisations. The latter is the kind of facilitation underpinning the implementation of the innovation system approach we have been practising. We call it facilitation for change (F4C).

F4C aims at stimulating the 'creative orientation'¹ of people both at individual and organisation levels, and is built on the domains of organisational change and/or development through action learning and learning organisation theories (Argyris & Schön, 1974; Schein, 1992) and systemic approaches (Senge, 1990). F4C reflects a strong psychological perspective to human development.

This paper is about a facilitative participatory intervention approach that aims at influencing change at the different levels of the innovation service delivery system (demand side, supply side and organisational / policy support side). The focus here is on the demand side, and it highlights the role of facilitation in mobilizing communities to better articulate their demands and strengthen local organisational capacities for better linkages with service providers and enhancing creativity and innovations. The insight gained, shows the quality of facilitation and the related competence both for training of extension agents and for community facilitation as a key success factor of the process.

2 The context of facilitation for change: the Participatory Extension Approach (PEA)

PEA was initially developed with success in Zimbabwe in the 1990's (Hagmann et al, 1998) and since 1998 it was adopted, adapted and further developed as an alternative approach to innovation service delivery in South Africa. Since 2001 PEA has been implemented successfully in Dominican Republic, Tanzania (some elements of it) and since 2006 in Cambodia.

PEA is an alternative to conventional extension approaches where technical experts give advice to farmers about enhancing production (technical advisory services). Such a commodity based linear model does not reflect the whole system which influences innovation in terms of social dynamics in a given community. This often results in only a minority of farmers being involved in research and extension activities.

PEA focuses on a combination of 'social extension' and 'technical advisory services', and takes into consideration that agricultural challenges are complex and need to be dealt with in a complex manner. This model deals with the social dynamics and looks at service functions required in a 'problem solving based' innovation system in smallholder farming. The focus is much more on establishing a common platform for trying out new things and includes the majority of farmers/ community members in this process. It aims at enhancing people's adaptive capacities and addresses all factors including social (behaviour and practice), economic (markets and resource mobilisation), ecological (natural resource conservation) and organisational (leadership) matters.

Both components; technical advisory services and social extension are required to support communities in their own development. It is therefore not about 'either – or', but the key is a successful integration of technical advise and research into a sound social innovation process. This is the central avenue of PEA.

The main objective in facilitation PEA is to:

- Develop the individual and organisational capacities of rural people and their communities to be able to deal with the dynamic challenges and changes of development (adaptive capacity).
- Facilitate a process of self organisation and community emancipation to enable people to better articulate and represent their needs for agricultural and social services vis à vis service providers and administrative organisations.
- Develop and spread technical and social innovations in a process of joint learning, which builds on the life world and local knowledge of rural people who have agriculture as a common foundation and then

¹ According Robert (1994) reactive orientation is evident when people do not feel responsible for any circumstances that prevail around them, but they find someone to point their fingers at. People with creative orientation are not blaming others but rather ask themselves how they might have contributed to their circumstances, either by what they do or what they do not do, and find ways of remedying the situation.

spread to other fields of rural development. and is connected to decentralisation and municipal development and service delivery in South Africa.

- Link rural people and organisations to external service providers, input and output markets and sources of innovation in order to create a functional innovation system where the demand side and the service supply are both well developed.

3 Operationalising PEA in communities- the PEA learning cycle

The PEA learning cycle as shown in figure 1 is a reflection of the operational steps of the PEA process as implemented at the community level. The learning integrates a variety of extension methodologies in a consistent learning process to deal with different issues in agriculture and rural development. This learning cycle has evolved in Zimbabwe and was adapted based on the subsequent South African lessons. It consists of six component/ phases which are:

- initiating change;
- searching for new ways;
- planning and strengthening local organizational capacity;
- experimenting while implementing action and
- sharing of experiments and
- reflecting on lessons learnt and re-planning.

The local organisation change is the backbone that cuts across all phases as a continuous process. Each component/ phase is carried out in a series of sub-steps, which build upon each other. The implementation of these components is not in a once off mode, but follows a cyclic mode, where reflection and feedback back to the communities take place at the end of each component.

The 'learning cycle' is a systematisation and conceptualisation of experiences over many years. It is meant as a guide or 'rail' which helps to lead the way when one goes through it for the first time. In the second time, one hardly needs a 'rail' anymore as one knows the stairs and one has own experiences, special paths etc. leading to the destination. So, the learning cycle is not at all meant as a blueprint but is an aid for learning.

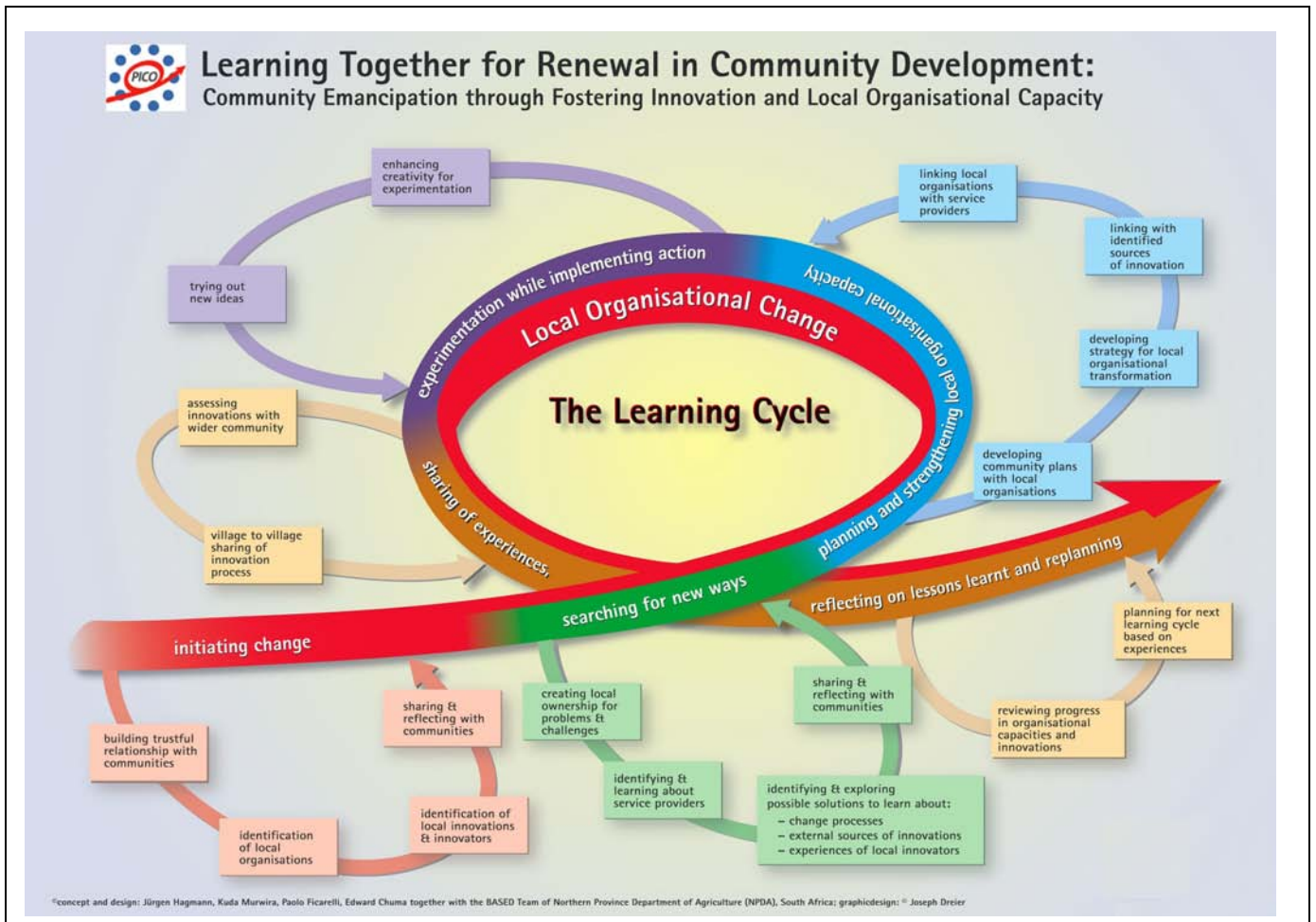


Figure 1: The PEA learning cycle as implemented at community level

4 The Intention of facilitation for change in the community

Experience shows that there is a direct link between impact of participatory approaches and the QUALITY of facilitation. It is less the plans and tools underpinning approaches, but what matters most is the 'HOW' these approaches are implemented. In our cases, F4C played a significant role in triggering the process of community emancipation and innovation, and here we show some of the fundamental factors underpinning this facilitation

Facilitation for trust building: Three factors necessitate building or regaining trust as the first step towards engaging people in change processes. Firstly, the failure of many development efforts to address delicate issues such as governance, emancipation etc has made communities in South Africa (like in other developing countries) to become sceptical and pessimistic about any new initiatives. Secondly, the non-inclusive 'projectization' approach to extension leaving the majority of the marginalised, has also created resentment and hostility towards extension officers and more over towards the minority of the farmers who 'belonged' to the extension projects. Thirdly, the socio-political changes brought by the post-apartheid government South African of resulted in a dual governance system (besides the existing traditional authorities, a parallel structure comprising of a politically nominated administrative management was established, and even given power over the traditional structure)

The mistrust towards development initiatives and extension officers compels the facilitators for change to finds ways of re-gaining trust that PEA was somehow different from the many initiatives that had failed and also convince communities that they (the facilitators) have changed their attitude and would now to work with everybody in a more inclusive manner. Finding a right entry into a dual authority system, whereby one establishes trust and good relationship with both structures and finding ways of working with both towards development issues, becomes crucial for the PEA facilitators. The challenge is for them to be as authentic as possible, create necessary openness and transparency on all sides so as not to be seen as taking sides and

to drive a vision for a joint responsibility by all fractions for their future as a community. Ultimately, this means making people reflect deeply and come to terms with the current local politics.

Facilitation for creating discomfort: 'Discomfort is the driver for change'. Unless people feel uncomfortable with their situation (be it through suffering or through ambition), they do not see a need to engage in change process. Comfort zones (no change zones), even in a miserable situation are generally being created through many behavioural patterns, such as blaming government or others for lack of development, or the lack of resources etc.. It is often this 'victim culture' that makes people feel their status quo is beyond their control, thus do not make any effort to change their situation. The core element of engaging people with such thinking in a change process is to create and bring to the surface their discomfort clearly.

People are provoked and challenged to critically analyse their past situation, which resulted in their current status quo of lack of development – their path which brought them to the status quo. This includes patterns of thinking, of acting, of decision making, of leadership, of resource use etc. They are also challenged to imagine a scenario of how threatening the future would be like if their situation remained as it is (without change). Through such provocative analysis and confrontation with their own situation, people gradually moved away from their comfort zones and begin to take responsibility for their lack of development. Their urgency to search for alternatives is then triggered.

Facilitation for creating a joint vision for development: Creating discomfort is not enough. There is a need to bring hope to the hopeless situation. This means helping people acquire a new sense of direction and orientation. Through a facilitated process, people are supported in developing a joint vision for their own development. The vision here is not meant in a narrow sense in terms of a 'nice' situation to be achieved, but is rather an imagination on **how** development can be brought about. It is a vision about what collectiveness and inclusivity means. It is also about the behaviour of different actors, what they should do or do differently for these aspects to be realized. Through critical questioning and probing, discussions and the use of a range of facilitation tools, the divergent views of people are explored and controversial perspectives are debated in the sense of 'constructive controversy', different interests are negotiated, and a shared meaning and mutual vision for development, collectivity and inclusiveness emerges.

Facilitate for making people analyse their situation critically: Here people are helped to realise their resource base and what potential they have in terms of leading their own development process. Positive examples where they succeeded and are proud of it are being analysed in an appreciative enquiry mode, but also situations where they felt most ashamed as a community and individuals that they did not succeed. They are challenged to critically reflect on their own situation, in terms of how they are organised, what social capital they have, what natural resource base they have and how much technical indigenous knowledge they have as a community and the factors which make them succeed and fail. This kind of reflection makes people to begin to appreciate their local resources. It also help generates a lot of energy in people because they realised that the solutions to their problems are actually within (individuals) and amongst (group) them. This positive energy enables them to be more courageous to start using what they have towards addressing their challenges.

Facilitation for creating ownership of the process and self-reliance: The conventional top-down approach to extension (as practiced in South Africa and many other countries) often makes farmers assume a passive role. F4C is about challenging people to realize that the solutions to the community's problems lies within the community itself, and any change initiative which is externally driven will not sustain in solving these problems unless the people concerned take full ownership of process and become the 'drivers' of their own change. Examples are analysed, patterns explored and sometimes facilitators take a highly provocative stand. The aim is to help people take ownership of their problems analyse them and find solutions. The active involvement of the people from the beginning and throughout the entire process, help to change their attitude about who they think development effort is for. It also make them come forward in terms of mobilising own resources to solve their own problems. People normally quickly realise in this challenging process that *'life is not a project'* and that development is about their own life and what their roles then need to be.

Facilitation for self-discovery of behavioural patterns and hidden potentials: There are certain patterns in most South African communities (also in many other countries) like the 'culture of silence', the 'victim culture', the 'blame culture', the 'waiting culture' - that are engraved in people's behaviours due to a range of reasons and collective reinforcement. These patterns submerge peoples' potentials and strengths and hinder development efforts in a fatalistic way. F4C is about unearthing and breaking these patterns. Once openly discussed and provoked such patterns reveal themselves as detrimental and people start to explore how they can escape and they also discover their 'source of power' to change things. (e.g. when people feel like the victims of the situations or others, the facilitator challenges people in the dialogue: *how does it feel to be a victim, does it feel good? Does it make you proud? Do good excuses make you feel proud? What makes you proud then.... So, if all these things/problems would not be there, what would be different?*)

The hidden potentials are being brought out mainly by involving people in a range of activities where they get the space to perform and do things they normally do not do. Often some of the things which people do who are considered 'crazy' are being analysed and often people start seeing a value as they offer real solutions to some of their problems. Creativity is encouraged actively.

Facilitation for making people see the systemic nature of the developmental challenges: In many projects, people are often asked to identify their needs and prioritise them. The people often come up with a 'wish list' of felt needs without going deeper to reflect on what the underlying issues of such problems could be. The outcomes of these projects are then evaluated on the basis of activities carried out rather than the impact it has. F4C challenges people to see the systemic nature of problems with an aim of creating awareness of the possible linkages between their perceived problems, the possible root causes, the systemic blockages and the effects the problems might have at the later stage. It is not about the demand per se, but rather the quality of that demand and the articulation thereof. Having a broader insight to the issues help the people identify the appropriate actions and options where they can act on their own. Ultimately it is about strategic and systemic thinking which is being developed through the facilitation.

Facilitation for local organisational development: Local organisation development (LOD) is a backbone for community development and innovation processes equally. F4C challenges people to analyse the need for working collectively and get organised effectively. The rationale is that for local organisations to be sustainable, the need for working together should be intrinsic rather than extrinsic. The essence is to facilitate a process of collectiveness and inclusivity while recognizing the needs and interests and space of individuals. Hence, social differentiation in terms of gender, age, wealth and different interests becomes the basis for local organizations and also find a space where these different interests are negotiated for the purpose of moving forward collectively. Central is the analysis of what makes people work and organise together and what impedes it. It is easy to facilitate that process as people have endless experiences which can be taken as cases. Again, it is the awareness of the processes, systems, mechanisms and patterns of successful and unsuccessful organisations which trigger the energy to deal with the issues. As a second step, the existing organisational structures and systems are being screened with those self-identified success and failure factors and people negotiate new forms and ways of organising themselves. The process is much more sophisticated than it can be described here, but the key principle is that people themselves find their own way to get organised well. F4C can help them to explore how to do that by asking the relevant questions.

Facilitation for re-discovering and creating norms and values: The rural communities have over time developed a complex system of norms and values. These practices have become so "normal" that in most cases the people are not even aware of them. The "modern" society and its values have changed the traditional structures, so that often serious conflicts between modern and traditional elements in the rural societies emerge. (E.g. the role of women in decision making and leadership)

F4C is about helping people to deeply analyse the origin and state of values and norms which emerge as issues. This analysis enables people to 'bring out in the open' the issues and to identify alternatives. Often the solutions are not so far, but the issues, taboos and power structures block them. The idea is to unblock the debate and enable dialogue and negotiation to take place. For example, due to the PEA intervention, women were often the first time accepted as equals by their male counterpart, and were given a chance to be in leadership roles. Many other new norms and values (such as unity, inclusivity, learning through self-reflection, sharing, trying out etc) were created throughout the PEA process and promoted in the form of the by-laws of the different interest groups.

As a way of internalising some of these values, farmers often created proverbs, slogans, songs which they often sing in meetings and in the field as a reference point to encourage the society. This means of communication has been a powerful facilitation tool, specifically in South Africa which has a long tradition of this way of communicating for mutual encouragement². Malunga and Banda (1994) also find a niche in the use of African proverbs in understanding organizational stability and building value-based society.

² During the apartheid era where the black people were deprived freedom of expression, they used songs and slogans as a means of communication. In PEA this means of communication has been a powerful facilitation tool. The farmers use songs, slogans and proverbs to mobilize each other, to encourage and give support to each other. They compose the songs that are relevant for specific situations. The trend is that in community meetings where they start by singing songs and chanting slogans, the level of engagement and participation of all is much higher.

Facilitation for creating linkages and stakeholder collaboration: The development of the innovation system depends to a large extent on the collaboration of different actors. Creating a platform where different actors come together, negotiate interest and learn to play the roles together is one of the success factors in F4C. Through the PEA process, the different linkage processes are facilitated, depending on the need for establishing that particular linkage. The rational is to first identify the need for the linkage, then identify relevant actors, bring them together, negotiate interest and establish a common goal with clearly defined benefits and roles from the beginning. Then the process of '*Learning to play the roles together*' can start which is in itself the process which makes the system work step by step.

Facilitation for stimulating creativity, solution-orientation and an entrepreneurial spirit: In the technical advisory model (as suggested above) the extension officers focused mainly on solving certain technical problems (either as expressed the farmers themselves, or presumed by the extension officers). This problem-focused development approach often becomes a blockage in itself. A 'problem' is often seen as a stumbling block, with very little that one can do to overcome it. This blocks the people thinking capacity and reduces their positive energy to engage. The PEA process focuses more on stimulating peoples' thinking in a solution-based manner. This approach encourages people to see challenges ('How to.....'). Instead of finding reasons why things cannot work, people are encouraged to see opportunities to make things work. It is this '*Problems feed opportunities*' kind of attitude that makes people to become more creative and entrepreneurial by trying out alternative solutions.

As peoples' capacity to systematically try out and analyse things develops more and more in the process, they also require a space for making mistakes. The slogan '*nobody knows everything, and nobody knows nothing*' encouraged people to learn from those mistakes. This slogan is a norm in itself and has become very popular reference point among the farmers in the villages, as it gives them space to make mistakes without fear and it provides a certain equality which is very motivating.

Facilitation for establishing a culture of feedback and reflection: The 'culture of silence' is prominent in most African societies, more especially in the rural communities. Because of this entrenched pattern, people tend not to challenge things even when they see that it is detrimental for development (both at individual and community level). The normal thing is that '*either you are with me or against me*', Often this is then interpreted that '*it is better to be a living coward than a dead hero*'. What is lacking is a third way of engaging without dividing. What is critical for F4C is challenging this in a subtle manner by promoting openness and transparency, which are fundamental for constructive criticism and shared responsibility.

Instilling a culture of feedback, sharing and reflection as the foundation for PEA and maintaining it through the process makes it normal for people to ask why certain things are happening the way there are '*ask the unaskable questions*', and to bring the '*inside out*' in order to get to the crux of the problems. Constructive and appreciative feedback has been the core in helping people to differentiate between facts and personal attacks. The feedback culture creates the space required for individuals to use their potentials in a forward looking way.

Facilitation for information sharing: Most farmers have always been trying out new things in their little islands, but these innovations were not shared with the rest of the farming communities. There are many reasons why the sharing did not take place. Some innovators did not trust the other farmers enough to share their innovation. Farmers did not have any formal platform where sharing was encouraged, even within the extension projects. Many farmers themselves were not confident enough to stand in front of others and share in a manner that would be appreciated by others. F4C creates space and platforms where farmers consciously and systematically share their innovations and information. Learning through sharing at group level, inter-group level as well as with the outside communities, has been made an integral part of the PEA process. Once an atmosphere of 'constructive controversy' is created, people like to share as it provides confidence and recognition in the society.

Facilitation for making people see facts instead of politics: Beyond cultural differences that often affected both individuals and communities, leadership struggle between modern and traditional organisational system prevailed in the South African case (either explicitly or implicitly). The cooperation among the people is affected, which also have influence in the sabotaging of development efforts (especially when initiated by a member of the opposition). Many of the problems and conflicts that arise in these communities and their organisations are due to 'politicising' issues. Anything is seen in the light of ethnicity, personalities and relationships rather than facts. Often what matters is not what people say or do, but rather who says it or do it (in terms of ethnic group, political affiliation and/or social groups they belong to). This often affects the objectivity and diminishes the rational thinking of people.

A significant contribution of F4C is challenge people to 'de-politicise' issues, engage them in negotiation processes where they focus on tasks, roles and functions (rather than people). The basic principle for process design is '*form follows function*', meaning that the WHO comes last. If not facilitated otherwise,

normally people come first with the WHO and the structure and then look at what needs to be done, which undermines the principle of 'capacity first'. The F4C process to de-politicise is being 'sliced' in very small steps and sub-processes starting from 'what to achieve', 'how to achieve it', 'how to organise ourselves', 'what capacity do we require', 'what functions do we require to make it work', etc. until finally one comes to the WHO, after all the criteria for all the positions and functions have been defined (including criteria on how to remove people/leaders if they do not perform). These de-politicisation processes are the most difficult ones to facilitate, but the most crucial ones to make things work.

5 Some methods and techniques for Operationalizing F4C

Questioning techniques are central to F4C. Through provocation and probing people are challenged to think and reflect. The questioning techniques can be learnt rather quickly, but the content of the questions needs to be linked to solid experiences in organisational development and change management – besides the vision of emancipatory development. In terms of questioning and provocation, we have learnt a lot from Frank Farelli & Jeffrey Brandsma's 'provocative therapy' approach, which is being used a brief-therapy approach in psychotherapy. Many of the questioning techniques come from the systemic questioning domain – which is also used a lot in psychotherapy and in team and organisational development. Another inspiring source for questioning techniques has been Fran Peavey's strategic questioning techniques.

F4C also draws its strength in the use of a variety of solution-focused approaches (e.g. Insoo Kim Berg), Paolo Freire's social change approaches operationalised with the concept of 'codes' as Training for Transformation (see Hope and Timmel, 1984) as well as concrete tools, some of the PRA toolbox; the use of visuals & pictures (many based on Gestalt psychology); models & simulations; demonstrations; the use of proverbs, songs and slogans (very powerful in oral societies) and role-plays.

This paper does not allow to go into the details of operationalisation, but overall it is obvious that this kind of facilitation is way beyond the notion of a few facilitation techniques and nice tools. It is very demanding and not everyone might have the highest potential to become an excellent facilitator. Naturally, this becomes a challenge for large scale implementation.

6 Competencies required to perform F4C

To become a facilitator of PEA calls for extension officers to de-learn the top-down mode of engaging with farmers and assume a role of a catalyst for social change in the sense of what Hagmann (1999) calls '*Learning together for change*'. They need to acquire a combination of competencies, therefore engage in comprehensive learning process aiming at stimulating whole-brain orientation, in order to achieve a balance between the right and left hemisphere of the brain³.

6.1 Competencies regarding vision and values for oneself and for development

Being a facilitator for change is a challenging role in that it requires a strong own emancipatory vision for oneself and for development, in order to be able to provide orientation for others. Change facilitators need to fully understand and orient themselves towards a vision of participatory development processes, where human development and people self-development are the ultimate goals of extension rather than the technical development per se.

Process-oriented learning approaches such as PEA are by nature not a blue print with fixed goals and fixed time frames. It is therefore, essential to have a clear vision which serves as a 'guiding star'. It is such a guiding star that enables the facilitators to navigate amidst the complexity of community development and allows for a logic flow of processes. This so called 'guiding star' comprises more than a mere goal, but could include a vision and some core values that guide the implementation of the process. These values and visions have to be internalised and made transparent in groups in order to minimise continuous suspicion about some hidden agendas.

³ The brain science asserts that the left hemisphere of the brain is responsible for linear processing, logical, analytical, systematic and sequential thinking; communicate using words; concern with things as they are, accuracy. This is what conventional training often stimulates. The right hemisphere concerns with holistic processing; synthesizing; intuitive, imaginative and random thinking; communicate using images; concern with emotions and feelings and creativity.

6.2 Competencies regarding personal development aspects

Facilitation competence does not go without self-development of the people. An insecure or not very confident person does not make a good facilitator. Special attention is given to the issues of personal development aiming at stimulating and enhancing the cognitive, behavioural/ attitudinal and emotional levels simultaneously in order to build the capacity of individual personalities to act in a different way. This comprises of:

The Cognitive level of personal development: At the cognitive level, the aim was to stimulate their minds to lateral and strategic thinking in terms of system perspectives and processes. This means that the facilitators need to understand how systems operate, so as to be able to help to influence those systems in a more effective way. This is however, less likely to be achieved if they themselves do not have an understanding of how their own system operates. They first have to acquire a frame of mind, which is open to a type of learning which exposes them to self-awareness, critical thinking, and critical reflection, which according to Cranton (1996) requires moving beyond the acquisition of new knowledge and understanding, into questioning of existing assumptions, values and perspectives. This means that the extension officers are to be exposed to various alternative concepts and paradigms, as well as stimulating their creative mind by giving them space to try out and experiment new ideas. This dimension of change at the cognitive level also necessitates change in behaviour and attitude.

The behavioural/ attitudinal level of personal development: The ability to think in a different way 're-conceptualisation' often demands a 180 degrees swing in attitude and behaviour and aborting both learned experience and historical success patterns (Dotlich & Noel, 1998). As shown above, there are often deep rooted prevailing values and social norms, which affect people's perceptions in a profound way. Formal education for example, has always been seen as a model for development. Such attitude of valuing formal education more than experiential, non-formal knowledge was evident in the way in which the extension officers related with the farmers before PEA.

The facilitation of the PEA process however, requires a less hierarchical mode of learning where both extension officer, researchers and farmers engage in a joint learning process. This means that all parties have to change their attitude vis à vis each other. The focus at this level is on challenging the extension officers to critically reflect on their experiences, as a source of their current state of mind.

The emotional level of personal development: Managing complex social processes in communities, which are characterised by continuous uncertainty, requires to some level of confidence. In helping facilitators to read a process, thus reducing the uncertainty and creating a reference base for decision making, a sound degree of common sense, empathy, self-awareness and self-regulation-in other words 'emotional intelligence' (Goleman, 1995) is necessary. Promoting it to a level that it is embraced by the people requires a lot of attitudinal change, and there must be something in it that makes the people acknowledge the difference.

6.3 Competencies regarding Facilitation

The facilitation skills comprise both the ability to observe processes and the techniques of using different tools.

Process related skills: The process related skills comprise elements like process observation (including monitoring and evaluation), process documentation and the adaptive capacity. Due to the unpredictable nature of the PEA processes, the facilitators need to have strong observational skills, which enable them to understand better their environment. They also need an intuition to sense how their own thinking, attitude and behaviour influence the group. This also means to find the right balance between addressing individuals and the group. It is these skills that allow the facilitator to continuously adapt to provide for the changing context. But the adaptive capacity also means that one is aware of several options, which give courage to choose from.

Facilitation Techniques

The art of questioning and probing: The ability to ask relevant questions which stimulate people's ability to think beyond the surface is the skill that is crucial throughout the PEA process. This form of questioning and probing is in contrast to the conventional way of providing solutions to problems or asking questions where the answer is known (like teachers do). Questions which are explorative in nature without driving towards a pre-conceived answer are a real challenge for facilitators and for participants. '*Your question is not clear*' is a standard response from participants on open, often circular questions which are really challenging to explore and interpret. It is often difficult for them to grasp that the interpretation of the question is already part of the answer. For a facilitator to use these techniques effectively, he/she should be broadminded and be able to see the connectedness of issues and move away from a teaching culture.

Managing facilitation tools such as codes and simulations: As shown before, the use of codes and simulations can be a powerful tool in enhancing the facilitation of PEA processes (for example, depersonalizing things). However, the effectiveness of these tools depends strongly on how they are facilitated. Having a 'toolbox' of codes and simulations is not enough, what matters is the ability of the facilitator to know when to use a certain tool, how to use it and what questions to ask in order to enable an effective decoding process. Binding together the essence of the code to reality and shaping the future is very critical.

Visualisation skills both optical discussion and optical scenario are necessary in enhancing F4C. To make the visualisation effective, it is necessary that the visuals are clear, interesting and humorous. This puts a challenge on the part of the facilitators, in that they have to be creative. For some facilitators this 'artistic' expression is inborn, but for the majority it is a real challenge, and it makes them hesitant to use it.

Giving and receiving feedback: In the PEA process the 'feedback culture' is a core value. From the very beginning of the learning process (both at extension and community level) feedback is consciously instilled, and maintained throughout. This means that the PEA facilitators have to continuously encourage openness and constructive feedback among farmers. However, the facilitator cannot hope to foster these skills in the group if he or she cannot manage feedback.

Managing group dynamics, team building techniques: One of the values that the PEA process is promoting is the move from the individualistic to a collective approach of dealing with developmental challenges. This means people with different backgrounds, needs, attitudes etc. have to work jointly. Another dimension to this is aggravated by the value of inclusivity, which means that people of different socio-economic status come together in one group where they have common interest. From the facilitators' point of view, he or she must find ways and means of ensuring that these diversities are not detrimental to the group, but rather enriching the group performance.

Toolbox: The toolbox is not a facilitation technique, but is a collection of different tools that are necessary in the facilitation process. The extension officers are introduced to as many tools as possible, so that they can make a collection of options that they can later use in the field practice. In the course of the training, most of the tools are used practically to allow the officers to experience how the tool works and to encompass the effect of each tool. Such an experience makes the officers internalise the tool, and also put them a better position to be able to use later in the field. However, the tools have to match personalities who use them.

6.4 Competencies regarding conceptual and methodological aspects

This involves the broader technical, conceptual and management knowledge in relation to extension organisational context, community development context and operational and process management aspect.

Extension organisational context: The critical analysis of the current situation in terms of its success and constraint, the reflection and analysis of the history of extension approaches and articulation of vision for effective extension service form the basis through which new alternative ways for improvement can be discussed.

Community development context: Facilitators need a better understanding and internalise concepts related to community development such as local organisational development (LOD), rural livelihood system and other related fields

Operational and process management: In order to operationalise and manage the PEA process, there is a need be exposed to concepts of change and change management; facilitation for change; design/ management of learning process intervention and mentoring and coaching.

Basically the facilitators for change have to learn all about change, how to influence change and how to influence groups to think without driving people but bring out their inside.

7 HOW TO DEVELOP THESE FACILITATION COMPETENCIES?

The facilitation competence development process is an iterative learning, which cannot be dealt with in a conventional modular training way, but requires learning by doing and reflection thereafter. The learning process is planned and organised in a series of 5 learning workshops spread over a period of 18 months. Each workshop is followed by a period of 2-4 months field practice, where the trainees implement what they have learnt in selected villages. This allows for blending theory with practice and simultaneous intervention at two levels (extension and community levels)

The training strategy		
Phase	Activity	Duration
1	Orientation learning workshop	15 days
	Field practice- initiating change	2 months
2	2 nd learning workshop	10 days
	Field practice	4 months
3	3 rd learning workshop	10 days
	Field practice-	4 months
4	4 th learning workshop	10 days
	Field practice-	4 months
5	5 th and final learning workshop	5 days

The focus of the learning workshops is to expose the learners to different concepts and provides a platform for reflection on the field practice experiences. This allows the learners to co-generate solutions to deal with the challenges encountered in the field and serves as monitoring and evaluation mechanism.

In all the learning workshops all the competencies mentioned above are dealt with, however the intensity differs per workshop.

In addition to these series of workshops, trainees also go through specific technical workshops where they learn and deepen technical know how in response to the farmers' demands. At the beginning of PEA four major technical areas were soil fertility management (SFM), Soil and water conservation (SWC), Small scale seed production (SSSP) and Livestock production (LP). As the process unfolded additional technical areas were included as per the demand to support farmers.

7.1 Organising the learning, field practice and mentoring

In order to manage the implementation of PEA activities, there was a need to establish a support structure parallel that existing provincial management system (see figure 2 below). The PEA project management team, with the provincial coordinator and districts coordinators, mentors/ backstoppers at sub-district level, with peer learning teams (PLTs) implementing at ward level was set up as a support to the line structure of the department. A mentoring and coaching process was designed to support the trainees in the field. The trainees were grouped into peer learning teams (PLTs) based on the geographic areas. The peer learning teams consisted of 3 to 4 members who are implementing in 3 to 4 villages. The trainers / mentors, who are well ahead in terms of the process, provide mentoring and coaching to the PLTs. Each mentor/ backstopper is responsible for 3 to 4 PLTs, depending on the areas.

The purpose of PLTs is to provide support for each other during the field practice in terms of planning together, giving each other feedback and also giving moral support when facilitating community meetings. The mentor/ backstopper is responsible for providing guidance and support to the PLTs when needed.

The mentoring process and support structure

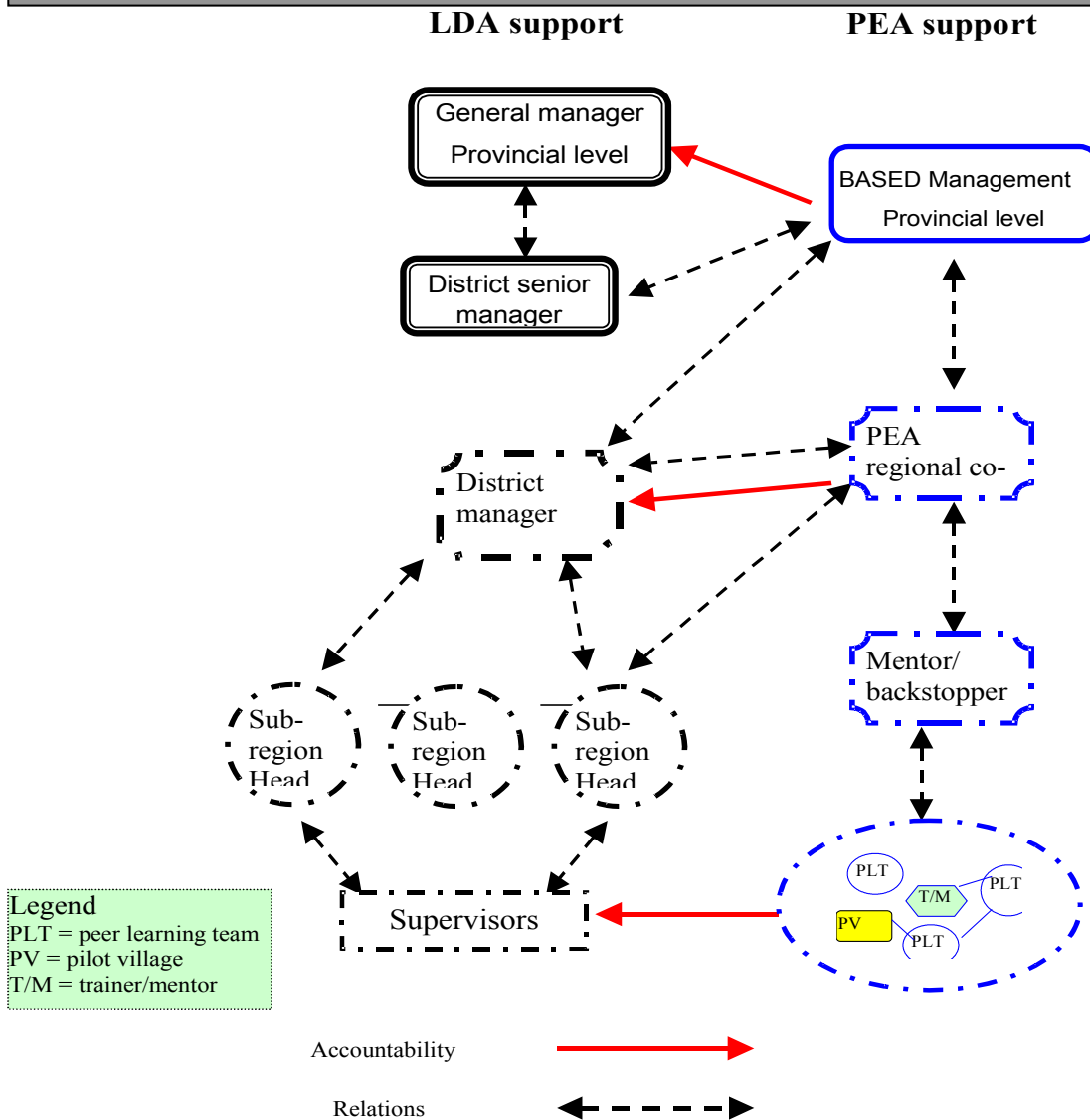


Figure 2: Organisation of the mentoring process and support structure

8 Going to scale with facilitation for change

Going to scale here means horizontal expansion, vertical integration and intensification of activities.

8.1 Horizontal expansion of PEA

Two evident approaches to the horizontal expansion were adopted. The first approach was by developing more facilitation competence of extension officers to take the process further in more villages. This was envisaged even at the beginning of the piloting phase.

Extension officers trained in PEA (1998-2005)

Between the years 1998-2000 there were 35 extension officers engaged in the learning process in two sub-districts (Vhembe and Capricorn) implementing in 6 villages. We refer to this phase the 1st generation / cohorts, and the extension officers and the villages involved the first generation trainees and villages. During the second generation, which started in 2001-2003, the number of trainees increased to 103, in those two initial districts, implementing in more than 80 villages. Since 2003 (the 3rd generation), the competence development process continued to spread to the other four sub-districts within the province.

According to a process review- PPR, 2005), there were about 389 extension officers (EOs) trained in the five phases of the PEA learning cycle and applied the approach in 211 villages in five of the six districts of the

Limpopo province, by June 2005. This PPR 2005 also reveals that 142 (37%) EO were trained in SWC technical area, 109 (28%) in SFM, 71 (18%) in livestock production & management, and the remaining 67 (17%) trained in SSSP.

The second approach was by training farmer trainers to facilitate the spread of technologies beyond the PEA villages. This came as a response to the increasing spreading of technologies from one community to the other. While the extension officers undergo the lengthy learning process, the technologies were also spreading so quickly through farmer to farmer interactions. This meant that the developed technologies were spreading beyond the PEA, even without the intervention of extension officers. In order to foster a more systematic and meaningful diffusion of technologies, some farmers were selected in the PEA villages and were trained in different technical areas, so that they can be able to train others and get the best out of the farmer-to-farmer extension process.

Farmers becoming farmer trainers (1998-2005)

The Process Review (2005) showed that there were about 200 farmer trainers trained in the same technical areas that extension officers were trained in, to stimulate spread of innovation from farmer to farmer. The PPR also reveals that about 105 villages in the five district of Limpopo province have by then been implementing soil fertility management, 99 villages doing SWC, 98 villages doing SSSP and 95 implementing innovations in livestock production.

The table (2) below depicts the number of villages that are practicing different technical areas in the Limpopo Province.

Number of villages practicing different technical areas Limpopo Province							
Technical area	Vhembe	Capricorn	Mopani	Sekhukhune	Bothlabelo	Waterberg	Total
FSM	74	24	02	02	03	-	105
SWC	68	21	03	03	04	-	99
SSSP	68	23	00	04	03	-	98
LP	75	12	01	04	03	-	95

Table 2: Villages practicing different technical areas Limpopo Province by 2005

PEA beyond the Limpopo province

Beside the horizontal expansion within the Limpopo province, in 2001 the PEA process was also started in the Eastern Cape province of South Africa, and in 2002 spread to the Mpumalanga province by the competent practitioners of Limpopo province.

8.2 Vertical integration / institutionalisation

The involvement of the LDA management in the impact assessment of PEA pilot cases played an important role in getting the buying-in by the department, and getting them to adopt the approach as a promising option to break the unsustainable development in the province. The adoption meant that the department had to find mechanisms for integrating PEA into its existing structure and system. This was realised by mandating the Senior Manager Extension to become the champion who oversee the overall PEA integration process, and the establishment of a provincial change management team, with a task of facilitating PEA integration activities. More about the institutionalization process is written elsewhere as it would go beyond this paper here.

9 MAJOR LESSONS AND INSIGHTS

9.1 Lessons with regard to the facilitation for change

Facilitation for change is like keeping up a mirror – in a way a therapeutic function. It triggers a deep psychological confrontation with oneself and challenge deeply entrenched patterns and ‘conventional wisdom’ of people. It is this confrontation with all its ups and downs which opens the way for real transformation and going beyond the usual. If the facilitator is able to create a high level of honesty to oneself in the process and a political incorrectness which allows things to be called what they are in a forward looking, constructive way, it can set free a very high level of energy for change – individually and collectively. This energy can make the system to become pro-active and people to dare to be in charge of their own life and discovering their power for change. All the energy which is often utilised to cover up for failure, opens up for being used for a positive engagement with reality and for the creative search for solutions to build a better life.

'The fact that you do not want to look in the mirror, does not make you more beautiful'

It aims at developing emancipation from inside to enable people to better use the space they have and develop their –often underutilised – potentials. This dimension is often neglected in the empowerment debate. Empowerment is more linked to ‘giving the space’ through rights, resources etc. F4C is about ‘utilising, developing and expanding the space’ – transformation.

'A changed place can not transform an individual, but a transformed individual can change a place' (African Proverb)

Facilitation for change is then about ‘informing the process through questions and self-reflection’. To be able to guide such processes and add value, the facilitator needs to have a full grasp of the vision and the matter of the process. Facilitation is therefore requires a high competence and professionalism to be successful and is way beyond the common notion of learning a few ‘facilitation techniques’ which can be learnt in a short training course. It is like developing a professionalism.

Facilitation for change is a strong instrument to operationalise the social development agenda in terms of inclusion, cohesion and accountability of peoples’ institutions. It has a high potential to support the development of a renewed social capital and social innovation in the communities and to create social process in which the technical innovation process can be embedded. This assumes that innovation is a socio-technical process which is not very successful if only being driven from one side – either technical or social.

9.2 Lessons with regard to the facilitation of competence development

Learning versus training: Facilitation for change requires complex competencies which cannot be dealt with in a conventional mode that put emphasis on training rather than learning. Ultimately it is about developing the profession of ‘change making’. The learning process is based on the co-generation of knowledge grounded on people’s experience, rather than receiving it from one who knows better. Getting people to this level requires substantive effort and high quality training / learning processes and trainers. Bringing out the real issues, confronting and provoking requires a deep experience and orientation of the trainers.

The use of *short-reflective cycles* (integration of learning workshops and field practice) have been crucial in enabling action learning and reflection and making the process more manageable and help fuel the energy. The longer the time without contact with the learners the more it flawed down. This process allows for flexibility and adaptive capacity to accommodate emerging issues along the process, while enabling capacities to emerge and better understanding of the process.

Mentoring and coaching is crucial during the field practice in providing guidance to the PLTs in terms of operationalisation of PEA. There is a high correlation in good relationship between mentors and PLTs and the high performance of those teams. The PLTs that reported having support from their mentors in terms of having regular joint planning and feedback meetings were outperforming those that complained about not having necessary support from their mentors.

While these principles have worked very well, this puts a high demand on the quality of trainers. This has been a major challenge for the scaling up process

The systemic nature of PEA: It is important to maintain systemic intervention approach at all levels. The competence development process needs to address issues in a holistic manner. The stimulation of the whole-brain functioning, and the blending of theory (learning workshops) with practice (field practice), allows for simultaneous intervention at different levels of the system. Facilitation of such holistic process with its

interconnected parts is a great challenge and the future trainers have been struggling. One should not expect quick successes through a trainer of trainers approach, but rather develop trainers as a longer term coaching process to develop both, the competence as practitioners and the training competence.

Feedback and sharing of field experiences by trainees during the workshop: Laying a good foundation for sharing by consciously promoting a feedback culture from the beginning of the learning workshops, has been crucial in stimulating debates, where trainees questioned each other in their experiential learning. During the sharing, trainees would challenge each other and demand transparency and evidence of progress made from their fellow trainees. This created a lot of peer pressure for the trainees to be active during their field experience, in order not to lose face. This form of 'encouragement' was considered very important by the learners. The sharing also served as a platform for developing a pool of possible solutions to the challenges faced by trainees

Peer pressure and the peer support system as motivators: The PLT concept used during the learning cycle was appreciated and commended by the learners in the sense that it exerted pressure for collaboration and joint learning and sharing of experiences. The officers who -beyond the learning cycle- find peer support perform better than those who work in isolation. Another important aspect that encourages continuity is the institutional support that some of these extension officers get from their local supervisors. The fact that supervisors and the department are interested in what they do, they see that as pressure to work harder, but in a positive way.

This shows that one of the sustainability factors of PEA is creating a platform that encourages peer support even beyond the formal learning and moreover, institutional support. The concept of peer learning teams (PLTs) used during the learning cycle need to be replaced by some forms of peer professional teams across the generations / cohorts. This is in line with the current on-going notion of Community of Practice (CoP) widely recognized not only as a benefit for the individual involved, but also a means for enhancing organisational performance and as a knowledge management tool (Wenger and Lave, 1991; Seely Brown and Duguid, 1991; Lesser and Stork, 2001; Wenger et al, 2002).

Another dimension where we failed so far – besides effective professional networks of facilitators and functioning knowledge sharing mechanisms is a rigorous quality assurance / management system. We see a distinct dilution of quality of competence from generation to generation both, of trainees and trainers. So far we have not managed to institutionalise a system which can continuously nurture the quality of the practitioners and the trainers. This would have to be an institutional function in the Department of Agriculture as an HR measure which has been very difficult to internalise. Our fear is that the quality will be eroding with time as the most experienced staff also move on after a some time and no new ideas and methods etc will come in.

9.3 Lesson with regard to going to scale

As the process expand with more people getting involved at different levels and activities intensifying, the process becomes complex, and need complex measures to manage it.

Quality aspect: The significant increase in the number of people involved as the process evolve from one generation to another results in a great loss in respect to the quality of PEA. What distinguishes PEA from other methods is its emphasis on personal development, learning through self-reflection and learning by doing. All these were more profound in the first generation and reduced on the way, with the 3rd generation inclined to move more towards information giving approaches – back to where we came from.

There is a need to make space for new learning to take place in order to balance the dilution of 'knowledge transfer' and to contribute to the ongoing theory of PEA.

Technology versus process: The intangibility of processes makes process knowledge to travel slower than technology knowledge. People remember what they see, and what they have achieved, but tend to forget how they got there in the first place. Technologies were spreading from one village to another without the learning process. Such spread in technologies is a great achievement. However, developing farmer trainers who conduct farmer-to-farmer training in technical areas have proven not only to help spread PEA in an organised manner, but also encourage farmers to learn, since they learn better from their fellow farmers.

Large-scale and Inclusivity: As the process expands in size, geographical scope and complexity, the inclusiveness of the process also suffers. Apart from the trainers who gain recognition by nature, the others who worked exclusively in the communities are less visible. The most vulnerable and less included are those PEA learners who did not manage to complete all the steps of operational framework during the formal learning cycle. This increases the likelihood of collapsing without notice. A coherent follow up structure would be required to maintain the link and create the learning and sharing.

There is a need to balance the scale between the so called "champions or super facilitators" and the rest of the PEA practitioners, in order not create jealousy by the mass. The challenge is how to keep the majority on board while creating champions to take the process further.

9.4 Lessons in terms of institutional response to the scaling pressure

Both 'institutional support' – the support that PEA learner get from their supervisors and other personnel- and 'institutionalization' – the formal integration of PEA into departments procedures- affect the effective implementation of PEA and its' sustainability thereof. There is a need to get the buy-in of the management from the beginning of the process. A change management team that oversees the institutionalization of the process needs to be put in place as otherwise the initiative gets personalised and creates resistance. The team need to look at issues of financial support, quality assurance mechanism and harmonization of the process with existing programmes. This cannot be managed in a conventional manner, but requires process related competencies.

10 Conclusion: what does all this mean for the context of participatory / innovation system development?

Our impression is that the challenge of what participatory development means is notoriously underestimated. This is reflected in many 'quick-fix' kind of trainings which do not reflect the whole system capacities. In terms of innovation systems, we are not dealing with market failure or technology development, but rather system failure. Due to the daunting conclusions, many spheres of development are still in a state of denial and do not want to see the dimension of the challenge. When dealing with system failure, it is not sufficient to look at linking farmers to markets and bring some actors together in technology development. System failure has to do with how people interact within the communities (the demand side) and the interface with the supply side (extension, research and other service providers) and the support side (provincial governments and policy makers). It is the deeper systemic capacity which is insufficient to make the system work as a system rather than as disconnected parts.

Facilitation for change as described in this paper has a potential to develop this capacity. However, it needs to be recognised that we are in a different dimension with the kind of competence required to facilitate high quality learning and change processes – no matter at which level we operate. When it comes to local level, the local facilitators / extension agents etc are often the lowest level in the organisations, the least cared for, the least paid and often the least motivated. Using the company analogy, if the sales representatives would have such a profile, most companies would be bankrupt immediately. Why do we expect in development that things can work that way?

We were very fortunate to have had a long-term commitment of projects and departments in a few countries which enabled us to develop our methodology for facilitation further. South Africa was the longest and most rigorous experience where we had the opportunity to demonstrate what impact a heavy investment in human resources for local level quality facilitation can generate. Still, while this is generally recognised and admired at the case basis, most departments and projects are shying away from such a longer term investment, trying to find cheaper short cuts which in most cases do not go very far after the end of the projects. The professionalism required is rarely seen by the technocrats yet. We once calculated the costs for the PEA competence development at large scale which amounted to about 1500 USD per person in South Africa– which is not impossible looking at the budgets of departments and programmes.

Looking at the other dimensions of innovation system development, the principles of facilitation for change do not only apply in the demand side (as reflected in this paper) but also in the other levels. There is a need to develop capacities (in the other levels too) and look at the whole issues of personal transformation to become more creative and entrepreneurial in the way in which they deal with complex challenges in are more systemic manner. We had similar experiences at the level of service provider and innovation platforms as well as at the policy and organisational level. These dimensions were not part of this paper, but in reality we addressed these three level as a systemic intervention to develop the whole innovation service system. The facilitation principles are the same as it is change management principles and we deal with a multi-dimensional change process.

To conclude, there is rarely one meeting (at least in Africa) where one does not hear that 'attitude and mindset change are pre-requisites for success and impact in development. When challenging people on how to this should be done, there is a normally a big void or hazy explanations. If we are serious we need to accept that we are still at the beginning of understanding change and how to create it and that the mainstream development professionalism is far from it. Our tools for making change are still raw. We hope that facilitation for change can contribute to moving the practice in that direction.

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