The normative practitioner

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3. Research methodology: intentional emergence

The research presented in this thesis used a phronetic approach to PAR. For the research methodology this implied that beyond the participatory cycles of action and reflection, the research went through layers-of-width – connecting micro-realities and field dynamics – and layers-of-depth – investigating mental models behind the theories-in-use. In this chapter, I present the research trajectory and account for the ways in which participation was facilitated at each stage, as well as insights and changes triggered throughout the research process. Like many PARs, this study had an emergent character in the sense that within guiding principles, activities and directions took shape through collaboration between the researcher and participants. Reflecting on the journey, I discuss challenges and limitations regarding power dynamics, fitting a PAR within an organisation's day-to-day operations and persistent barriers to implementing new action strategies.

3.1 Introduction

In chapter 2 I problematised the technical-rational approach to knowledge generation and utilisation in the lifelong learning for development field. Consequently, the research approach we used in this PhD study sought to embrace the reflection-in-action framework, which acknowledges the inter-subjective and dynamic nature of knowledge, whilst being critical of the power dynamics. The research approach was both inspired by phronetic research (Flyvbjerg, Landman, & Schram, 2012) and Participatory Action Research (PAR) (Boog et al., 2008; Reason & Bradbury, 2008b; Rowell, Bruce, Shosh, & Riel, 2017). Both these approaches offer a rich variety of approaches and methods. The research design and the methodology used in this study has been inspired by the existing body of knowledge on PAR and phronetic research, but it also had an emergent character calling for new methods and modifications to existing methods. In line with Bourdieu's reflexive sociology, in this research it would apply that: "The fact that there is no 'choice' that cannot be accounted for, retrospectively at least, does not imply that such practice is perfectly predictable [...]" (Bourdieu, 1977, p. 15). The research stages and activities presented in this chapter were not all 'known' from the onset of this research, but in this chapter I account for the choices made. By reconstructing our journey and the turning points, I illustrate the interplay of guiding principles and spontaneity, external forces and power dynamics. After presenting the research activities and milestones in detail I derive practical implications for other researchers who may want to use a phronetic approach to PAR and/or conduct this in collaboration with an organisation.

3.2 Phronetic PAR: redefining action and looking for layers

Before presenting the research trajectory that occurred between late 2015 and mid-2019, I would like to clarify the broader research approach. Action research is often presented as a series of cycles of action and reflection (McNiff & Whitehead, 2011; Reason & Bradbury, 2008b). These cycles are usually presented as a continuous spiral because knowledge in action research is viewed as tentative, and can be modified given new information and situations (McNiff & Whitehead, 2011). According to Reason and Bradbury (2008a): "in action phases co-researchers test practices and gather evidence; in reflection stages, they make sense together and plan further actions" (p. 2). Action research can start at any point of the cycle – either with an action or a reflection phase. For example, McNiff and Whitehead (2011) suggest starting action research by taking stock of what is going on and identifying a concern and possible solutions. Though the premises underlying the cyclical representation of action research are valuable, I would like to propose some modifications to how the action and reflection cycle is conceptualised for this particular research. First, I would like to widen our definition of action in PAR and add an element of layering in-width and layering in-depth to enrich the action and reflection elements. Based on these proposals I present a visualisation of the process that adds layers to the cyclical approach.

Regarding the action element of this PAR, I would like to clarify two things: how I related to action as the facilitative researcher and what will be demarcated as change or innovation in this view of action. Action researchers commonly distinguish first-person, second-person and third-person action research. First-person action research focuses on one's personal life world, second-person refers to a collaborative inquiry on a topic of mutual concern and third-person focuses on wider collective levels such as organisations or movements (Brydon-Miller & Coghlan, 2019; Torbert, 2001). These three types of action research are interconnected, for example, third-person action researchers also require the same level of reflexivity on their own practice as first-person action researchers. As an external person to the organisations involved in this research, I acted both as a second-person and third-person action researcher. Consequently, a large part of the action we investigated occurred on the work-floor, in my absence. Eikeland (2008) introduces helpful concepts to locate the processes of action and reflection: back-stage and on-stage spaces. On-stage spaces are the day-to-day operations and the primary processes of organisations, while back-stage spaces are those spaces where members reflect on their on-stage actions. This PAR created several back-stage spaces that fed on-stage processes of the participating NGOs (see for example De Haas, 2017). This implies that action does not always sit neatly in the PAR process and often happens outside of the view of the facilitating researcher, consequently not all activities may be investigated or evaluated in the PAR. Secondly, because in action research action and inquiry are inseparable and inquiry is seen as a form of action (Torbert, 2001; Udvarhelyi, 2020), I consider the back-stage spaces as actions. Especially because organisational learning is strongly associated with back-stage spaces (Eikeland, 2008). In a way, these PAR activities modelled and tested new forms of collaborative inquiry that itself taught us a lot about the organisational learning practices that are and could be. If we view organisations in a relational manner, whereby agency and structure are inter-connected, these spaces are likely to leave a dent on how things are done. As Heraclitus said: "No man ever steps in the same river twice, for it's not the same river and he's not the same man" (Bryan, 2013).

Though I refer to this PAR as a phronetic PAR, it is undeniably inspired by Critical PAR (CPAR) as well. Flyvbjerg (2008) defines phronetic research in the organisational context as: "an approach to the study of management and organisations focusing on ethics and power" (p. 153). McTaggart et al. (2017) emphasise that in CPAR: "participants are committed to engaging in a broad social analysis of their situation (exploring the conditions that prefigure their practices) and a collective self-study of their practices to determine what to do to improve their situation" (p. 22). Both approaches draw attention to problematic social structures underlying our practices – whilst phronetic research adds a strong focus on values. Inspired by both these approaches I introduce the element of 'layers' in this PAR. To produce the practical wisdom required to deal with complexity, this research sought to achieve a level of critical understanding about the interdependency of agency and structure in shaping practices. Concretely, in this chapter, I illustrate how we did not only move through cycles of action and reflection, but also through layers-of-width and layers-of-depth. Layers-of-width refer to the connections made between micro, meso, and macro realities and the movements of zooming-out and zooming-in. For example, zooming-out to understand organisational learning in seven NGOs through a multiple-case study design or zooming-in on the micro-scenarios of volunteers in one education programme; but also, very importantly, reconnecting micro-realities to wider field dynamics to understand why certain action strategies are adopted. Cutting through layers-of-depth refers to the movement across our theories-of-action, reaching the assumptions and beliefs underlying the action strategies of NGO practitioners. This requires not only cutting through the espoused theories-of-action, but especially those in-use (Argyris, 1999). These layers further illustrate that this PAR moves in between second- and third-person action research. Consequently, my role in particular was to enrich the reflection process by connecting actors in and across fields and steering inquiry into the underlying structures. Both in-depth and in-width analyses will help shine a light on power dynamics and value or meaning creating processes, by paying attention to the symbolic and structural order and how these are internalised through socialisation.

To visualise these layers-of-width and layers-of-depth I created a layered visualisation (figure 3). This diagram does not necessarily represent a chronological process, but highlights the elements of a critical reflection on the status quo – situating situations in their wider fields and analysing the processes of socialisation that shaped these fields. Secondly, to move in-depth to reflect on current actions and their outcomes through the levels of beliefs, assumptions and understanding as internalised perceptions of the field. Towards changing the practice of organisational learning, these new insights can lead to double- or single-loop learning, meaning the mental models may be revised or simply the action strategies. And finally, change can be perceived through its impact on the field. From the layered perspective too, 'back-stage' spaces become increasingly important to co-create practical wisdom that can transform problematic power dynamics through processes of deliberation.

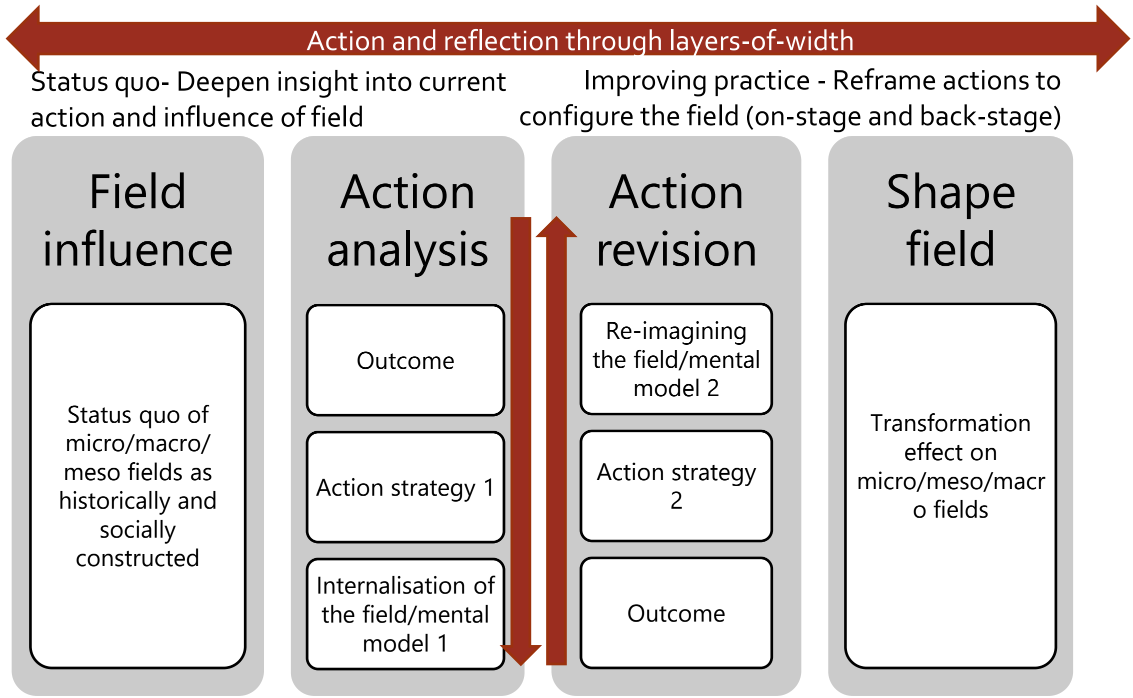


Figure 3 Schematic presentation of the layered PAR process

Chronologically we can distinguish five phases in the research presented in this thesis: orientation, problem diagnosis, case study entry, case study – learning team, and closing. Within each stage, both action and reflection occurred, cutting through different layers. Table 3 provides a chronological overview of the stages and research events, as well as knowledge contributions and 'back-stage' and 'on-stage' action innovations. The next sections present a detailed account of each research stage, including the activities, methods used, the role of the researcher, knowledge on practice theories and effects on agency and structure and challenges.

Table 3 Overview of research trajectory

Stage 1 Orientation, April to December 2015				
Purpose	**Main activities**	**Knowledge**	**Back-stage action**	**On-stage action**
Establishing what is meaningful OL, broker connections towards a community of practice	1. Informal consultations with practitioners in education NGOs (13 participants 2. Orientation dialogue	First impression of the role of OL in education NGOs and important themes in these processes	▪ New connections between NGOs and researcher ▪ Setting and experiencing norms of communicative space ▪ Modelling dialogue method for collective learning	Unknown
Stage 2 Problem diagnosis, January to September 2016				
Purpose	**Main activities**	**Knowledge**	**Back-stage action**	**On-stage action**
Identifying examples of and barriers of meaningful OL. Identify research direction	1. Interviews in seven education NGOs to profile OL practice (24) 2. Participatory workshop 3. Feedback committee for proposal 4. Ethical clearance	• Profiles of organisational learning in seven education NGOs • Prioritisation of issues • Co-creating tentative understanding of fields emerging around double-loop learning with external actors	▪ Exchange of OL practices between organisations – action inducing ▪ Set a shared vision for the research	Actions initiated by workshop participants - Community feedback - Further research triple loop learning - Inter-organisation sharing - M&E + implementation co-creation

Stage 3 Case study entry, October 2016 to September 2017				
Purpose	**Main activities**	**Knowledge**	**Back-stage action**	**On-stage action**
Map organisational field and opportunities for mutual learning	1. Leadership consultations 2. Observation 3. DLOQ 4. Hanging around/informal interactions 5. Interviews 6. Orientation workshop/stakeholder mapping	• Identifying who are the external actors and whose knowledges are currently included • Case study organisation as a field and deeper insight into OL practices	▪ Reflecting on how learning is happening and which knowledges are excluded ▪ Aligning research goals	Intentional involvement of actors 'missed' in the elephant map
Stage 4 Case study – learning team, October 2017 to December 2018				
Purpose	**Main activities**	**Knowledge**	**Back-stage action**	**On-stage action**
Deeper investigation and testing of organisational learning innovations on-stage	<u>Co-design</u> PAR workshops team Integration planning	Discrepancies between espoused theories and theories-in-use	A shared understanding of double-loop learning	Spin-offs like learning tracker, joint monitoring
	<u>Track 1: Volunteers as catalysts</u> 1. Interviews 2. Analysis workshop 3. Action planning workshop 4. Knowledge transfer session to new volunteers	• Reconstructed theories of action for dilemmas in SRHR education delivery • Applied reflexive thinking to transform the 'field'	▪ New spaces for staff and volunteers to meet ▪ Case interviews – reframing	- Training on stakeholder engagement - Knowledge transfer session to new volunteers - Changes to volunteer incentives/roles

	<u>Track 2: Community actors</u> 1. Interviews, FGD 2. Validation dialogue 3. Community-NGO meeting 4. Local government engagement	• Community perceptions on external-facing OL • Untangling power dynamics in community-NGO-local government learning spaces	Experimenting with a community-led space	- Sending greeting cards to external actors - External actors leading a training session - Parent sessions
	<u>Track 3: Double-loop learning capabilities</u> 1. Double-loop learning workshop 2. Force field analysis 3. Learning for success (2)	• Identifying barriers to double-loop learning • Redefining double-loop learning to fit the context & insight on preferred methods	Skill-building/ modelling of methods for double-loop learning	- Leadership reviewed 2018 work plans for learning integration
Stage 5 closing, January to May 2019				
Purpose	**Main activities**	**Knowledge**	**Back-stage action**	**On-stage action**
Synthesise findings and disseminate	1. Reflection interviews 2. Closing workshop team 3. Closing workshop leadership	• Harvesting insights on change processes in PAR and organisational learning processes	Dissemination to broader research groups	- Unknown

3.3 Stage one – Orientation

The idea for this PhD study was rooted in my own early career experience; I wanted to deal with the rigidity I experienced in several lifelong learning projects. To discover whether the problem I experienced was of concern to other NGO practitioners as well, I took initiative to open up a communicative space wherein participants come "together to address a legitimate concern of mutual importance as the impetus of the change process." (McTaggart et al., 2017, pp. 21-22). Wicks and Reason (2009) warn that the way relationships with participants are initiated can make or break an action research process. Referring to Habermas' distinction between *life world* and *system*, they encourage third-person action researchers to start from the lived experiences of participants and avoid an invitation to the research that is too formal. The latter may lead to a *system* focus on efficiency, control and predictability becoming the norm in the research space. During my visits to Uganda between April and December 2015, I met various peers working with ten education NGOs, two universities and a regional organisation for organisational learning. These informal meetings took place in their workspaces and cafes. The main focus of these conversations was to find out these practitioners' general orientation towards their profession, and the role of organisational learning in achieving the goals important to them. These views were important input for an orientation workshop in December 2015. In the weeks leading up to this workshop, I personally invited all practitioners to the orientation workshop and emphasised facets important to inclusion. In the one-on-one meetings I underlined that their contributions and thoughts would be important in shaping a good research process (Dustman, Kohan, & Stringer, 2014; Wicks & Reason, 2009).

The half-day gathering aimed at opening the novel communicative space between practitioners who were working with different education NGOs. I endeavoured to create an environment in which the *system* pressures would not set in, and to create a levelled playing field for participation regardless of seniority or gender. McArdle (2002, as cited in Wicks & Reason, 2009) encourages action researchers to craft such spaces creatively, to create a level of *un-normalness.* For this purpose, I selected a venue that offered multiple and diverse meeting spaces, the room was set up to mimic a round-table and on the walls were posters with quotes from the preliminary consultations about organisational learning. The programme aimed at combining informal interactions and sessions focusing on the topic of inquiry (Wicks & Reason, 2009). A total of eleven representatives from education NGOs, universities and network organisations, as well as the research supervisors, participated in this meeting. A dialogue about the participants' perspectives on organisational learning was the main element of the workshop. Isaacs (1999) defines dialogue as a "living experience of inquiry within and between people" (p.9). To facilitate this dialogue at this early stage of the research I opted to utilise the metaphor of *cooking soup* (Friedman & Blaak, 2016). The guiding principles were: everyone has something valuable to add to the 'soup' and silence is an important component of dialogue. To ensure everyone was able to form their thoughts and have a platform to express these, the dialogue was facilitated through seven steps.

1. Collecting spices through the *walk of quotes*: Quotes and paraphrases from preliminary interviews and consultations were pinned on the wall and participants were invited to select the quote[3] that resonates most with them.
2. Sharing the recipe: Introducing the steps of the dialogue, clarifying how to participate.
3. Lighting the fire: Giving participants a minute of silence to reflect on what participants want to say about their quote.
4. Adding ingredients to the container: Following the seating arrangement, participants each got two minutes to share which quote they chose and explain why they selected this quote.
5. Heating up the fire and stirring the soup: After listening to all participants, the floor was opened for participants to respond to each other's contributions.
6. Turning off the fire: Another minute of silence to reflect on the dialogue.
7. Tasting the soup/conclusion: Going round the table again, participants were invited to share what they picked from the conversation.

During the dialogue, several anecdotes were shared about how organisational learning was currently set up in education NGOs. In between the lines, insights emerged about the epistemology of organisational learning; how is knowledge generated and who are

[3] Example quotes: "Monitoring & Evaluation is not really designed to support learning. Even if it is innovative, qualitative or participatory it is not designed for learning." "When donors ask for lessons learned they want a list of bullets. It gives a picture but it doesn't capture learning".

the knowers. At this point, participants started highlighting something that turned out to be an important theme throughout the research. Majority of participants had selected the quote: *"The best learnings come from the most unexpected people; organisations should embrace that"*. In their explanation, participants underlined that knowledges from various people (including the guard, field staff, children) should be included through organisational learning processes. This theme recurred again in stage 2 and was guiding the collective inquiry in stages three and four. Participants were cautious about the power dynamics that could hinder this engagement as well, and mentioned conditions for effective organisational learning such as safe spaces, flat management systems and tolerance for failure.

After the dialogue, participants were asked whether it would be worth conducting a PAR towards improving organisational learning in education NGOs. Feeding into this conversation, a former PhD student who used PAR explained to the participants what a PAR could look like, emphasising that the research process is co-designed. Using the *human barometer* method, participants indicated how important the topic was to them by standing on an imaginary line representing a scale of one to ten. Generally, participants agreed the topic was worth pursuing because they felt organisational learning was an important means to ensuring their organisations facilitate meaningful education. However, they did not feel they were in a position to zero down on one particular research question. They recommended that we should first explore what is currently happening in different types of NGOs and what we should focus on according to multiple practitioners.

> I've also kind of made some reflection; have you been going to the education NGOs and asked them what is your biggest challenge that you'd like to be researched on? And if your answer is 'no', I think then I could [...] say you should actually go back and begin by just asking one or two questions. As education NGOs, they are doing so many different things what is that one common thing that they all want to be researched upon?
>
> Ben[4], Leader, Education NGO, Orientation Workshop, December 2015

[4] All names mentioned in this thesis are pseudonyms, except for the (co-)authors.

Building on this, participants recommended several NGOs that could be approached for such a stock taking exercise. After the meeting, I developed a workshop report with preliminary analysis and translated the recommendations into a work plan with the next steps.

All in all, the orientation stage enabled me to move from a first-person reflective practitioner to a second-person researcher facilitating a process to address an issue of mutual concern, but also a third-person researcher bringing together representatives from various organisations. It was relatively easy for me to connect with participants from the onset, given we work in the same sector. I understood their life world; we shared a similar educational background, vocabulary and embodied experience. In my subjective experience, the dialogue was successful in establishing a tentative communicative space. I call it tentative because we reached levels of inclusion but did not fully establish control and intimacy (Wicks & Reason, 2009). However, the orientation activities did set up a good foundation for the next steps. The metaphor of *cooking soup* and the *walk of quotes* reinforced the principle that everyone's knowledge is important. By the end of the orientation workshop, participants had not only hinted at important themes, but were also able to guide the next steps of the research. Every participant in the workshop contributed to the conversation and the fact that participants slowed down the researcher, inviting her to first map current practices, suggests that there was a sense of ownership over the research design. Choosing a conducive physical space and using methods that invite people to leave their chairs and move around to engage with data creatively helped to create a sense of *un-normalness*. Even though I managed to open up a tentative communicative space, as I illustrate in stages three to five, it proved difficult to engage this group up to stage five.

3.4 Stage two – Diagnosis of the problem[5]

3.4.1 Mapping organisational learning practices

In line with the recommendations of the participants of the orientation workshop, I set up a multiple-case study to investigate how organisational learning manifests itself

[5] Also see chapter 4.

across organisational contexts. As Stake (2006) underlines, by reviewing a phenomenon in multiple settings one can discover various facets of the research domain – or what he calls *quintain*. The quintain of this research being organisational learning in education NGOs who work in the lifelong learning for development sector. Even though this sub-study may not have been a thorough and in-depth multiple-case study, it does adopt important features of his approach. For example, in selecting the organisations, the criteria presented by Stake (2006) were honoured: "is the case relevant to the quintain? Do cases provide diversity across contexts? Do the cases provide good opportunities to learn about complexity and contexts?" (loc 829). The selection criteria for diversity were formulated by participants of the orientation workshop and included: nationality of the founders, education service, size, age and type of funding. Seven organisations were identified through purposeful sampling, as well as their accessibility (see table 4) (Creswell, 2007).

Table 4 Participating NGOs and interviews

	Nationality of founders	**Years of operation[6]**	**# staff & volunteers**	**Type of educational service**	**Location**	**Source of funding**	**# of inter-views**
1	International	3	7	Access to formal education	North	Private	3
2	National	15	10	Non-formal skills training & adult literacy	Central East	Fees, private	2
3	International	2	18	Teacher development	All regions	Foundations	4
4	International	3	27	Non-formal skills training	Central East	Foundations	5
5	International	20	381	Civic & sexuality education	All regions	Multi- and bi-laterals, foundations	4

[6] As of 2016

6	National	6	13	Entrepreneurship education	Central and Central East	Service contracts	4
7	International	5	6	Non-formal skills training	Central, North, East	Private, foundations	2

The premise of a multiple-case study design is that practices can only be understood in their context. Therefore, the semi-structured interview tools were designed to capture not only what organisational learning processes were in place, but also how this linked to the organisational context. The organisational learning processes themselves were investigated as per the concept of Organisational Learning Mechanisms (OLMs): "the structures that enable organisational members to jointly collect, analyse, disseminate, and apply information and knowledge" (Lipshitz et al., 2007, p. 16). OLMs help analyse organisational learning itself as fields with their governing rules for people to gather, process and interpret information about their social reality. To capture the organisation and its environment as fields, several multi-dimensional models of organisational learning were used as lenses (Chiva, Alegre, & Lapiedra, 2007; Jerez-Gómez, Céspedes-Lorente , & Valle-Cabrera, 2005; Lipshitz et al., 2007; Marsick & Watkins, 2003). Whilst it may be impossible to capture all dynamics in a field, these models helped investigate how each organisation formed as fields and the role of organisational learning in reconfiguring these fields. Between January and March 2016, I interviewed two to four representatives in each organisation, representing both support and implementation units. All interviews were recorded, transcribed and shared with the participants to add thoughts or suggest corrections.

To support a cross-case analysis, I developed short profiles of each organisation. These profiles captured basic organisational information, what makes them unique, major OLMs in place, examples of break-throughs that were a result of organisational learning and remaining challenges. In the process, I utilised ATLAS.ti to conduct a round of open coding, partially deductive based on the interview tool (and thus theoretical assumptions about organisational learning) and partially inductive following issues emerging from the interviews (Flick, 2009; Hennink, Hutter, & Bailey, 2011). These profiles were shared with the interview respondents first and later with the organisational leadership to comment in case anything was missing or misrepresented.

These member-checks were an important first step to validating the data analysis. In one instance an interview participant highlighted which quotes they preferred not to be quoted directly because they felt these could be traced back to them. The most important part of the cross-case analysis happened during the PAR workshop with representatives of the participating NGOs, as well as members who were part of the orientation stage. The workshop served two purposes. First, to enrich the analysis of organisational learning practices emerging from the interviews. Secondly, to inspire new action scripts through deliberation about: "what we are and could be doing so that our lives can be more rational and reasonable, productive and sustainable, and just and inclusive" (McTaggart et al., 2017, p. 25). Again, the venue for this workshop was chosen carefully, we gathered in the assembly hall of a school for children with hearing disabilities. By meeting directly in the life world of learners, I was hoping to inspire reflection on the rationale of organisational learning. Besides, by choosing a cost-effective venue I wanted to demystify that learning can only happen when there is a budget available to rent out costly conference rooms. This time the workshop was chaired by one of the research participants, not only because he is a competent facilitator, but also to emphasise the collaborative nature of the research. This allowed me as a PhD student to listen and observe more attentively.

As participants trickled in, they were invited to move around the room to review the organisational learning profiles of the seven NGOs that were pinned up on the walls along with a chart inviting comments. To get new members on board, I provided a brief overview of the research so far and one of the participants shared a recapitulation of the orientation workshop. I felt it would not be the most meaningful use of time for participants to dive into the raw data from 24 interviews. Therefore, I developed a method (the *discovery walk*) that could expose participants to raw data that I curated around broader themes emerging from the overall interviews. Participants were grouped in trios and discovered the data together. To guide our inquiry, I provided three questions: What opportunities and challenges do you see in this area? What are your personal experiences in this area? What could you do differently in this area? The themes were: understanding beneficiaries, the role of M&E, balancing formal and informal organisational learning and discretionary space for practitioners. Because the trios included representatives of different organisations, the exercise stimulated exchanging experiences, finding synergies and contrasting practices. During a plenary session, participants shared what stood out to them and I also made a short presentation of patterns that stood out for me. Participants received a form to write down their thoughts on each component of my presentation as well spaces to indicate how strongly they related to the message conveyed. The latter was aimed at gauging which thematic area participants would be most interested in exploring further in the next research phase. After the presentation, a short group discussion was facilitated to seek further feedback. In short, the participants contributed three important insights that determined the thematic focus of the continuation of the PAR.

i. Accurate picture - Overall, participants felt the profiles and findings represented what is happening in their organisations and they underlined that organisational learning is a contextual practice – taking a different shape in every organisation.

ii. Double-loop learning - Participants were most interested in investigating the themes of double-loop learning and learning from and with learners. Through conversation, participants connected the two through the concept of collective learning. They noted that double-loop learning would enable organisations to navigate power dynamics and pressures from donors by presenting progress beyond narrow targets. And enable more authentic learning from the learners themselves, who occasionally prioritise short-term results.

Figure 4 Photo of the vision drawings created by participants

iii. Need to go in-depth - There was a point of critique that the data collected so far through semi-structured interviews only revealed espoused theories and not theories-in-use, suggesting the PAR should investigate deeper the actual practices (see quote below).

> Marit ehm, because you said it's actually this action research, participatory ehm. When you getting the data, when I'm looking into in the beginning I see a lot of kind of formal [...] ways of exchanging information. [...] How do you make sure the information you're capturing, [...] you're not restricting yourself to the higher level of getting what kind of formal setting is here...

> but more less you get lower in the direction of ehm what is happening on ground.
>
> Sylvester, participant, co-analysis workshop

After establishing the issues of mutual concern, participants were invited to create a shared vision for the research outcomes. To tap into a different language, free from the *system* pressures, I chose a visualisation exercise. On the wall were four posters where participants could draw what they feel organisational learning could contribute to (a goal), the conditions for this, indicators for success and risks. To translate the relatively individual drawings into a shared vision I offered participants coloured stickers to vote on the most important issues. I further asked participants reflection questions like: Why did we select these particular issues? How can we explain the difference in our choices? Eventually, this led to an agreement that organisational learning should ultimately help learners (primary beneficiaries) achieve their goals towards holistic change in communities. The aspiration to facilitate holistic change in line with what is meaningful to learners and communities does suggest a desire to overrule trends of fragmentation and target-based programming dominant in the field of lifelong learning for development (also see chapter 4).

3.4.2 Research proposal – feedback committee meeting

The co-analysis workshop had provided clarity regarding the thematic interests of NGO practitioners, as well as a few pointers for the research design. As the facilitating researcher I was able to translate these insights into a research proposal. To support this process, I analysed the workshop transcripts and interviews alongside the literature on organisational learning and PAR. Matching priorities of practitioners with gaps in the literature I developed a proposal which I submitted for ethical clearance through the authorities. Both the Gulu University Research Ethics Committee (GUREC) and the Uganda National Council for Science and Technology (UNCST) cleared the research. To account for what I put together to research participants, I organised a feedback meeting with those participants of the workshop who expressed interest in providing critical feedback on the research process. Again, this meeting was chaired by one of the research participants, in this case, a PhD student in her final phase of research. The meeting took place in the meeting room of one of the participating organisations, reinforcing the shared ownership of the research process. Since a few months had passed, the five participants were invited to recapitulate previous engagements. It is beyond the scope of this chapter to provide a detailed report, but each participant mentioned examples of how the research so far had triggered them to change their organisational learning practice. Again, the idea that learning could happen from unexpected people was popular. One example was that one organisation started including office support staff in the annual programme review meeting. This moment of sharing revealed that the co-analysis workshop created a back-stage space to reflect on organisational learning, not only in their own organisation but also in other NGOs.

The majority of the meeting was spent reviewing the research proposal. To simplify this discussion, I divided the proposal into three parts; the why, the what and the how. Inspired by the *World Café* method, participants wrote down their thoughts, associations, questions and feedback on a big piece of paper that covered the meeting table (The World Cafe, 2021). In this meeting, I proposed to focus the research on double-loop learning with external actors[7]. I also introduced field theory as a framework to analyse the dynamics in and outside the organisation that affect practitioners. Generally, the participants responded confirmatory to the rationale presented. They expanded the proposal by brainstorming who these external actors would be and discussing several barriers they experienced to double-loop learning. All in all, the members made three recommendations for the research proposal. The first was to look beyond learning and education for youth and expand the view to lifelong learning. Participants stressed that there are gaps from early childhood development to adult education. At first, I was hesitant to take up this broad view as I worried it would make the research too wide. However, I took up lifelong learning for development as the broader field of interest, whilst keeping an eye on the unique requirements for youth programming. The second suggestion was to make the research question more explicit and mention the outcomes organisational learning should have; in this case, participants proposed capability development for the learners in their education programmes. For this purpose, the question was updated to: How can education NGOs in Uganda create space for double-loop learning involving external actors for delivery of relevant and sustainable lifelong

[7] Throughout the research I use the term 'actors' rather than 'stakeholders'. Though 'stakeholders' is a common term in development interventions, 'actors' in my view does better justice to the agency of people (Van der Laan, 2006). Moreover, from a field perspective, interventions are just one small aspect in development trajectories. Therefore, people cannot be reduced only to having a stake in one intervention.

learning programmes that contribute to the capabilities of young adults and their social systems? Which I simplified for the purpose of this thesis to: How can education NGOs in Uganda create space for double-loop learning involving community actors towards meaningful lifelong learning for development interventions? The capabilities of social systems were included from the perspective that youth operate in a field and by empowering them alone they may not have the opportunity to utilise new skills and knowledge. The last suggestion was regarding the type of organisation that should serve as a case study organisation. Participants confirmed the selection criteria I presented: Delivery of non-formal education programmes for young adults, organisational mission expressing an intention to build capacities of local communities, diverse funding-base that illustrates common donor compliance requirements, a departmental division between Monitoring and Evaluation and programme implementation and commitment to the research objective and process. However, participants did add a critical note to the criterion of a diverse funding base. They noted that the organisation should not be one that only learns to serve the donor needs, but should have a sovereign learning practice towards its own learning needs.

> I want to add also that maybe it could also depend on how much you are changing or influencing that space. You find cases where learning generated from organisations actually changes the thinking and practice of donors. [...] Going back to Marit's photo of the swamp how do you navigate it? To the point I actually say, river full of crocodiles, how is the organisation surviving? You know, they could swallow you up if you don't do the right thing (laughter). So that's interesting, how do you manage to keep it so many and still remain in the game... and you still deliver impact, people in the community are happy, things like that.
>
> Irene, support team member, feedback committee meeting

3.4.3 Layers-of-width

In terms of layering, both the orientation and diagnosis stage remained at the surface level of the broader field of NGOs working towards lifelong learning for development. In such a short period we did not manage to investigate organisational learning in-depth, but the wide-angle lens presented multiple advantages. For example, it allowed me to learn what practitioners felt were issues of genuine concern. By mapping organisational learning in seven NGOs, we were able to discover more about the quintain which formed a solid foundation to ensure the single-case study, executed in stage 3, yielded insights towards a topic relevant to other organisations. A participant recognised this as an advantage as well:

> I liked very much how much you include so many aspects of this topic, that especially when you look at the different themes that it's not just about M&E, or just about eh the connection between communities and organisations, but it includes... it's really it seems a very rich research in that way, so I'm really excited to see what comes out of it.
>
> Alexandra, participant co-analysis workshop

However, due to the wide-angle view, I also faced the case-quintain dilemma described by Stake (2006). I needed to find a balance between achieving some form of consensus about the practice being studied, as well as documenting key differences emerging through cases. Participants contributed to both sides of this continuum. They shared a variety of ideas and experiences – some of which we brought together into more coherent narratives through the vision exercise. In my experience, what was important was to reflect on what was so far said by whom and how this connected to the body of knowledge. Zooming in and out as a third-person action researcher put me in a unique position. I developed a more comprehensive oversight of all research activities compared to others involved in the research.

This also meant that some of the decisions I made in the process were informed by reflection processes that happened outside of the participatory spaces. For example, suggesting double-loop learning as a concept that could enrich organisational learning did not come from any of the participants; rather, it is a concept I identified based on the experiences shared. Somekh (2009) refers to action research as being in an *adventure playground* having the options to choose which research methods and identities to use in a particular situation (Somekh, 2009). She underlines that action research does not limit researchers to using specific conceptual frameworks, rather, theories and metaphors are helpful tools in developing agency. When inserting external frameworks to support participants in making sense of their world, Ernie Stringer encourages action researchers to do so "delicately by inquiring whether or not it's useful to think about this in these ways or if it might be possible to do this or that" (Dustman et al., 2014, p. 438). Therefore, I included member-checks to ensure concepts such as double-loop learning, field theory and the idea of learning spaces made sense to the participants – most explicitly during the feedback committee meeting. Participants confirmed that the lenses resonated with them – as illustrated through the quote on feeling stuck in the swamp and under the attack of crocodiles. As the research unfolded, I observed that participants added their own interpretations towards these concepts which I will further explain in chapter 7.

3.5 Stage three – Entering the case

3.5.1 Including leadership and staff

Based on the case study criteria, four of the seven profiled NGOs were eligible. However, one stood out in terms of accessibility and interest in participating in the research. This organisation is not a traditional education NGO, but a large component of their programming consists of a non-formal education model for youth across the country. At the time of the research, the case study organisation operated in ten countries and started operations in Uganda over two decades ago. The organisation consisted of around 70 staff and 250 volunteers. They ran eight different development programmes for youth in the areas of livelihood, SRHR and civic engagement. When it comes to improving organisational learning practice, the role of leadership is considered critical (Lipshitz et al., 2007). Therefore, I started by connecting with the senior management team. In February 2017, the country director had given a green light to the research process. Following their approval, I organised a half-day workshop for senior management in April 2017. The meeting, held at a school, was co-facilitated by myself and a senior manager who had participated in the research since the diagnosis stage. She became the first co-researcher in the PAR, playing a significant role in brokering relationships within the organisation, allocating time for activities and spreading findings and innovations. At the start of the workshop, managers updated the organisational learning profile that was developed during the diagnosis stage. After this, I presented a short version of the research proposal. I acknowledged that there could be other lenses to use, but that this was the proposed angle based on the mapping exercise. The main purpose, therefore, was not to explore new research questions but to establish whether this question was sufficiently meaningful to the organisation. The members noted that the question was aligned with the new organisational strategy that was also looking for mutual accountability with communities, and had a strong emphasis on learning.

After onboarding the leadership, there was a need to get a bigger representation of the organisation on board, and the entry stage aimed at developing a rich view of the field emerging around double-loop learning in this specific organisation and establish ways of working that could foster a PAR. To advertise the research across the organisation, I developed an infographic and a brief pitch that I delivered during an all-staff meeting. In line with the recommendation by one of the research participants earlier, I decided to investigate deeper whether the espoused practices of organisational learning matched those in-use. To gather these insights, I used a combination of conversational and observational methods. For example, I spent time *hanging around* the office where I was welcomed to use a desk to work on my research. This enabled me to have informal interactions with staff members during lunch and at the water cooler or meetings on appointment. Some of these were recorded, but I also took extensive field notes of spontaneous encounters and observations. These interactions helped strengthen relationships with staff from various teams, and formed an easy channel to be invited to activities connected to the research. I observed several activities that related to organisational learning. For example, a co-analysis workshop in youth-led research or a management meeting reviewing progress. Lastly, I used the non-profit version of the Dimensions of the Learning Organisation Questionnaire (Marsick & Watkins, 2003; McHargue, 2003) to rapidly gain insights into the views of people across the organisation. This survey was administered via e-mail using Google forms and led to a 30 per cent response rate. Findings were analysed using SPSS 24 and compared to findings from the DLOQ in other organisational settings (Marsick & Watkins, 2003). By using varying methods, I tried to create a safe conversational space, sometimes anonymously (such as the DLOQ) to mention sensitive issues, and other times informally to avoid the pressures of efficiency, letting the conversation flow without a specific goal.

3.5.2 Identifying the 'location' for the PAR

It had become clear at this point that the organisation with eight different programmes had a decentralised manner of decision making. Therefore, it made sense to zoom in on one programme team that offered a relevant context and could accommodate the research to go through layers-of-depth. Before establishing this, I wanted to make sure I had a sense of the most important themes and issues emerging around double-loop learning with external actors. I sought to validate themes emerging from my observations and conversations through two workshops. I planned these gatherings together with the lead co-researcher. In May 2017, during the annual planning retreat, all staff were invited to a 90-minute mini-research session. Besides informing members about the research purpose I was trying to clarify what PAR is like and how members could participate. Rather than explaining this verbally, I opted to model it and illustrate the *un-normalness* of this research. For this purpose, I developed a methodology called *elephant stakeholder mapping* (see Intermezzo 2). After a brief introduction of the research purpose, I used the metaphor of the elephant and the blindfolded men to explain collective learning – emphasising that we need to consult external actors to gain insight into the true nature and solutions of problems. After this, programme teams developed their *elephant maps* by establishing the social problem their elephant represents, listing the various actors who know something important about this problem (and clarifying what it is they know) and finally listing the platforms they have in place to mobilise these insights. Groups received red, orange and green pencils to rate how successful they were in terms of engaging the actors in each little field. This self-assessment helped expand the view of the organisational field to the external actors affected and involved in the various programmes. Also, some of the programme teams reported having used the insights gained to include new platforms to involve those actors whose voices are underrepresented. A second important meeting that helped narrow down the issues to focus on was the thematic validation meeting with the senior management team. In September 2017 I had analysed the data through a round of open coding in ATLAS.ti. A few themes stood out in regards to the way organisational learning was leading to critical improvements in the education model. To validate these themes, I created *statement cards* to trigger a critical discussion (e.g., #8 If we had all the money in the world, we would run our education model like this). Managers picked a card in turns, and posed the statement to each other. Reaching a level of convergence, this meeting confirmed a few challenges observed, especially the lack of flexibility in programming, despite several efforts to include community voices and making interventions youth-led.

Based on this convergence, together with the lead co-researcher, I identified three possible programmes that would suit the research. One of these turned out to be difficult to access given it was implemented through a consortium of organisations. For the other two, both located in central-eastern Uganda, I organised orientation workshops to enable teams to make an informed decision about participating in the research. The half-day workshop started with a similar exercise to the *walk of quotes*. This time programme staff and volunteers walked around the room to discover quotes about organisational learning in their own organisation. We engaged in a dialogue about emerging insights and how these themes manifest themselves in their programme. I also introduced the basics of PAR and asked the team what they would expect from the research process and me as a facilitating researcher. Through these workshops, I discovered that both teams were very interested. Together with the programme manager, we selected the team that had the best capacity to implement innovations.

In November 2017 I presented a brief summary of my orientation report to all staff during a retreat. The emphasis of this short session was to explain the next steps and clarify where the PAR would be located. The lead co-researcher presented the opportunity for other members to join an internal feedback committee similar to the structure adopted by Tukundane (2014). This idea, however, never materialised and illustrates a challenge that seemed to reoccur in this PAR: once you narrow the group of participants it requires a significant investment to keep others involved and informed. As a part-time PhD student, it was difficult to find time for deeper and regular engagement with the bigger group. Tumuheki (2017) underlines the importance of empathy towards the already burdened lives of research participants. In this case too, the low response rate from organisational members may have suggested they might have struggled to find the time. Therefore, I had to be flexible and utilise the platforms in which staff were already meeting to keep everyone updated and seek input throughout the research process. In addition, to keep a wider audience involved, two editions of a newsletter were created and disseminated to the wider research community.

Table 5 Organisational level workshops across stages 3 to 5

Seq. No.	Topic	Participants	Date	Chair/facilitator
1	Leadership orientation	Senior management team	10/4/2017	Marit
2	All-staff orientation (elephant mapping)	All staff	11/5/2017	Marit
3	Thematic validation	Senior management team	14/9/2017	Marit
4	Research update – first findings	All staff	30/10/2017	Marit
5	Research update – findings update and discussion	All staff	15/5/2018	Programme team lead & Marit

6	Force field analysis for priority changes	All staff	16/5/2018	Senior management member & Marit
7	Learning from success	All staff	8/11/2018	M&E member & Marit
8	Leadership closing meeting	Senior management team	31/5/2019	Marit

3.6 Stage four – Case study: Three learning and innovation tracks

3.6.1 Goal inquiry

Now that we had zeroed down on the location of the PAR and the group that would go through the cycles of action and reflection together, it was pertinent to identify which part of their organisational learning practice with community actors they wanted to improve and how we could set ourselves up as a PAR team. During the orientation meeting, programme team members had already expressed that collective learning with external actors in their education programme was an area of concern.

> When we engage external actors like teachers, local leaders, youth and parents in learning, we usually share knowledge, gain knowledge from them or generate knowledge with them. From my perspective, the things we have done, the meetings we have had with local government, I do not think we do actually generate knowledge with them. We do a lot of informing rather than them contributing [...] So, they really have no much to say in those kinds of trainings or meetings, because we have come with our structured agendas on what we want to inform them.
>
> Penninah, implementing educator, orientation workshop

To set ourselves up for action and reflection cycles, I opted for a methodology inspired by the action evaluation approach of Friedman and Rothman (2015). This approach starts from goal inquiry to discover issues of shared concern, recognising that multiple actors often define success in projects differently. Friedman and Rothman (2015) used a survey for the goal inquiry, but to save time I organised a *why, what, who workshop* for the programme team in November 2017. At the start of the workshop, participants shared their personal passion for youth development. This centred the conversation around the *why* and helped identify several commonalities between team members. The conversation then moved to the *what* using the guiding question: Through this PAR, what will change in our organisational learning processes around our education model? This conversation resulted in roughly three goals:

I. Strengthen engagement processes for youth and other actors in national sexuality education policy development.
II. Mobilise volunteer voices to reshape the education model at an organisational level.
III. Strengthen inter-team learning about the education model.

Initially, the *who* section of this workshop was meant to identify who should be invited to join as co-researchers in this PAR. However, the team felt hesitant to bring people on board such as the district officials, health workers, youth and parents, out of fear of receiving socially desirable answers. They requested me to meet them separately to give them a private voice. This conversation started to reveal the team's perceptions of collective learning spaces; they felt that external actors often used narratives to save face. At the end of the meeting, the team members were given co-researcher forms that sought consent to participate as co-researchers. This formalised the PAR team, though new members would come and others would go over the course of the research. The PAR team at this point included implementing practitioners, team leaders as well as support staff such as monitoring and evaluation officers.

In November and December 2017, I conducted interviews with two Community Based Organisations (CBOs) working in the space of SRHR education, district officials, parents and volunteers (see table 6). For the volunteers, I organised a Focus Group Discussion (FGD) using similar statement cards as those I used with senior management. One of the volunteers brought me to the village he previously operated in to introduce me to some parents. I conducted short interviews in which he acted as a translator. In part, this could have influenced the participants' answers as I may have become associated with the NGO – this is difficult to establish. Overall, the interviews and FGD revealed that there was little opportunity for the various actors to influence and critically review the programme. The volunteers felt their views did not reach the decision-makers. On a positive note, one district official felt the case study NGO is a positive outlier, especially because they disseminate their research findings widely and utilise a multi-dimensional approach for youth programming. However, during the interview, he also mentioned that perhaps he could take on a more critical stance and step away from his position at the periphery.

> I think I should dig deeper and get to know, it's at that level that you can get to understand and maybe be of more use to them than staying at the periphery.
>
> Pius, district official, interview

Later in the research, I discovered that Pius acted on his own recommendation and joined the NGO in meeting youth groups.

Table 6 Interview participants *why, what, who*

Actor category	#	Method	When
Local government	2	Semi-structured interview	November 2017
CBO working in the same field	2	Semi-structured interview	November 2017
Parent	2	Semi-structured interview	November 2017
Volunteer educators	8	Focus Group Discussion	November 2017

To further equip the newly formed PAR team, I decided to share theoretical concepts related to the research topic. As recommended by Ernie Stringer (Dustman et al., 2014), I tried to test together with the co-researchers which conceptual tools could be helpful for us in the process. The workshop was co-organised with the programme team lead and co-facilitated by one of the M&E staff who had been involved in the research since the start. Other roles were distributed amongst various team members such as timekeeping, energizers and photography. Using PowerPoint and videos I illustrated double-loop learning (Argyris, 1982), the ladder of inference (Senge, Kleiner, Roberts, Ross, & Smith, 1994) and blame and gain frames (Ramalingam, 2006). After these introductions, participants formed small groups to apply these concepts to fictive scenarios based on the preliminary findings (also see chapter 7). This workshop contributed to a shared understanding of double-loop learning that formed an important foundation for the rest of the research. It also created a space for personal reflection as to why certain frames and actions are carried into learning spaces.

To round up the goal inquiry, I organised the findings of the various *why, what who* consultations in Venn diagrams illustrating what the various actors had in common, what unique views emerged and what conflicting views emerged. Whereas Friedman and

Rothman (2015) used a multi-actor dialogue, we only met with staff and volunteers following the decision made earlier about the configuration of the PAR team. What stood out when we reviewed the findings was that all actors were deeply passionate about equipping youth to achieve their goals and drive change in their communities. They all believed that participatory approaches were needed to set up such interventions. Conflicting views emerged around whether the existing spaces for participation were actually effective. This was a turning point in this PAR in the sense that the team started to ask themselves: are our learning mechanisms in line with how these external actors want to be engaged? For example, the team had assumed that their quarterly reports for local government actors would be sufficient to keep them informed, but in many cases, these same actors expressed not being sufficiently updated about their progress. The team raised follow-up questions such as: How do these actors like to be involved in the programme cycle? What kind of information do they like to receive? What could these actors contribute to our programming that we are currently ignoring? At what stages of the programme management cycle has our NGO involved key players so far, how and what has been the result (non-, single, vs double-loop learning)? Though this may seem like a fruitful co-design session, at this point, I started questioning whether the goal inquiry was specific enough. It seemed like the same issues kept recurring and they did not become any more concrete. In the next rounds of activities, however, I realised that for the issues to be concrete we also needed to go through the layers of depth behind the problems as I explain at the end of this section on stage 3.

In March 2018, we held a third PAR meeting to set specific goals and create an action plan. From this point onwards the team's action research meetings were chaired by team members. This allowed me to focus on specific input to feed the process and observe the conversation. Revisiting the issues discussed in the previous meeting, we brainstormed innovations and research activities to address these issues. To support this process, I presented several action research methodologies that could help us investigate the field and root causes of the problems faced. For each activity, a lead person was assigned and a tentative timeline was determined. Roughly, the activities started to carve out two learning pathways: one focused on improving the volunteer capacity to engage with external actors and a second to find out what external actors themselves wanted. These two tracks are illustrated in more detail below and in chapter 7.

Table 7 Research and innovation activities scheduled by the PAR team in March 2017

Activity	Executed
Sending cards for Easter.	Yes
Map what information stakeholders actually want.	Yes
Map existing platforms in the sub-county.	Partially
Stakeholder mapping - Knowledge network.	Yes
Volunteer & staff training on stakeholder engagement. Invite a stakeholder to the training.	Yes
Participate in activities organised by the district/sub-county	Partially
Review current systems in place	Partially
Tracking stakeholder engagements (re-initiating the check-list that existed).	No
Action at home review + volunteer-led innovations.	Partially
Publicity based on the mapping exercise.	No

Whilst on paper this planning session suggests a strong sense of ownership over the PAR process, in reality, the assigned leads were not always able to follow up on the activities. This slow progress was disappointing to me and in the PAR process, I had to learn to reframe my own definition of success. Through personal conversations with mentors and supervisors, I learned to appreciate that there were many demands for the co-researchers. Some had to go for maternity leave, others left the organisation and were replaced. I learned to appreciate the small steps taken, for example when the parent curriculum co-design activity was not as comprehensive as I would have hoped, at least the co-researcher included a new set of questions and reached out to parents before planning the sessions. Together with the programme team lead, I tried as much as possible to follow the rhythm and work schedules of the team members and look for synergies with on-going activities. I also continued to maintain my connections with the head office, once in a while spending a day in the office. This allowed me to update leadership through informal conversations. This parallel process led to some small spin-offs, for example when a member of the M&E team felt inspired to revamp the learning tracker to make sure all programme teams track their learning regularly. Learning, in this case, referred to key insights about the programme design and implementation strategies that emerged during programme implementation.

Table 8 Action research team meetings programme level

Seq. No.	Topic	Participants	Date	Chair/facilitator
1	Orientation meeting	Programme team	2/10/2017	Marit
2	Why, what, who	Programme team	8/11/2017	Marit
3	Double-loop learning workshop	Programme team + local office teams	15/1/2018	Marit + M&E member
4	Research design	Programme team	9/2/2018	Marit
5	Action planning	Programme team	12/3/2018	Programme staff
6	Action check-in	Programme team + supervisor	19/4/2018	Programme intern
7	Volunteer innovations	Programme team	10/5/2018	Programme volunteer
8	Team re-orientation	New programme lead + team	26/7/2018	Marit
9	Learning from success workshop	Programme team + local office teams	1/8/2018	Victor Friedman & Marit
10	Collaborative analysis	Programme team & volunteers	17/9/2018	Programme volunteer
11	Research integration	Programme team	7/12/2018	Programme team lead
12	Closing workshop	Programme team, volunteers & local office team	13/5/2019	Marit

3.6.2 Learning track 1 – Volunteers as catalysts

In February 2018 a new cohort of volunteers joined the NGO to implement the programme in various communities across central-eastern Uganda. Within the PAR process, the team had established a goal of equipping volunteer educators to more effectively broker relationships with external actors, especially at the community and local government level. Eventually, a learning track evolved resulting in a reframing of the volunteer role as changemakers and catalysts of double-loop learning.

To introduce the new volunteers to the workings of the PAR team, I was given half an hour during their orientation training. In this session, I asked volunteers to write their vision for change on a piece of paper. I then drew a padlock on a big paper explaining that we could view the desired change as the padlock and I drew a key, representing the programme model they were currently being trained on. In my explanation I gave the volunteers a disclaimer that the key may not always fit; there may need to be some adjustments to unlock the change and that this research is looking into the processes through which the NGO learns and makes such adjustments together with those involved. After the session, around a dozen volunteers expressed interest in being part of the PAR team. Their main motivation was to ensure the programme they were about to deliver would bring the intended impact to youth in the communities. Several volunteers also expressed interest in experiencing a research up-close after they had learned about it in university. By observing three of their training days, I also got an impression of how the programme was framed for the volunteers and what was said about engaging external actors. Moreover, it provided an opportunity to interact with volunteers informally during lunch and tea breaks; these were usually very joyful moments wherein we took selfies or discussed issues around development.

In March 2018, I met the group of interested volunteers again during one of the volunteer meetings. By now they had implemented the programme for a few weeks and had first-hand experiences with external actors. During this conversation, one theme stood out in particular; the volunteers felt insufficiently equipped to act as changemakers, instead, they felt they were trained to be target achievers. After the meeting, we formed a WhatsApp group to ease communications and coordination about the volunteer involvement in the PAR. Starting April the volunteers chose representatives to participate in the PAR meetings with the programme team and occasionally chaired the meeting. As a result of volunteers and staff meeting at the table, the two parties developed a mutual understanding. It became clear to both parties why certain practices continued to persist despite new insights. It seems important to meet each other back-stage and not only on-stage where system pressures dictate the modus operandi.

> But eh, last year you made our work easier (haha) with this research, whereby volunteers understood our position. They also understood that we have somewhere where we can also end. And then, they understand that it is not all about reporting, reporting every now and then [...] but also working, working around to solve the, any challenges by themselves but not [...] specifically relying on [program officers] for support.
>
> Juliana, implementing team member, closing workshop

The double-column case interviews that I facilitated from February to November 2018 also formed an important catalyst in this PAR. This interview method is inspired by

Argyris' double column method and further adapted by Action Design (Rudolph, Taylor, & Foldy, 2001). Before the interview, participants were given guidelines on writing a case about a dilemma or a success they experienced while engaging community members in their work towards improving the education activities. In the right-hand column, participants wrote what occurred and, on the left-side, they wrote personal thoughts and feelings. In those instances where a participant did not submit a case in advance, they would share their story at the beginning of an interview. After explaining the case, participants established whether they felt this was a dilemma or a success. If dealing with a dilemma, we followed the method of reframing described by Razer and Friedman (2017). After reconstructing and investigating the theory of action applied in the situation, we examined the original frame used. Alternative frames were then explored and a more desirable frame was selected by the participant, feeding into a brainstorm of alternative action strategies. If dealing with success, we followed the learning from success method described by Schechter, Sykes, and Rosenfeld (2004). These interviews aimed at reconstructing the theory-in-use which contributed to the success and which general principles the organisation might learn from this instance. After the interview was transcribed, I conducted a thematic analysis (Flick, 2009) to summarise the original theory-of-action as well as the new theory-of-action or general principles of success. This summary and the transcript were shared with participants for feedback. Only three participants shared feedback while others solely acknowledged receipt. During the action research workshop of September 2018, I presented general themes emerging from the interviews, and staff, together with volunteers, discussed the findings and explored desirable action strategies to ensure volunteers are better equipped to facilitate collective learning more critically. The ideas were further cemented during the staff-only PAR meeting in December 2018 and a back-ward planning session with the programme team lead.

Table 9 Double column case interview participants and themes

#	Role	Pseudonym	Sex	Method	Theme of the case
1	Volunteer 2017	Thomas	Male	Problem reframing	Position of volunteers
2	Staff	Beatrice	Female	Problem reframing	Monetary expectations, position of volunteers
3	Staff	Patricia	Female	Problem reframing	Monetary expectations

4	Volunteer 2018	Mildred	Female	Problem reframing	Complexity of change in SRHR
5	Volunteer 2018	Priscilla	Female	Problem reframing	Monetary expectations, position of volunteers
6	Volunteer 2018	Peter	Male	Problem reframing	Position of volunteers
7	Volunteer 2018	Mildred	Female	Learning from success	Complexity of change in SRHR
8	Volunteer 2018	Teopista	Female	Learning from success	Monetary expectations, position of volunteers, value contradictions
9	Volunteer 2018	Amos	Male	Problem reframing	Complexity of change in SRHR, position of volunteers, value contradictions
10	Volunteer 2018	Moses	Male	Unstructured	Value contradictions, volunteer position
11	Volunteer 2018	Timothy	Male	Problem reframing	Monetary expectations, volunteer position
12	Volunteer 2018	Lilian	Female	Unstructured	Volunteer position, value contradictions

All in all, these series of events helped unravel the mental models that hindered volunteers (and staff) from engaging in critical learning with external actors, as well as the strategies they used to manoeuvre tensions around programme targets, budget constraints, conflicting expectations and value contradictions. Through a reflexive thinking process, the interview participants first individually, and then as a team, during the workshop examined their own beliefs and actions. Whereas the team at first aspired to equip volunteers to better represent the organisation and promote the programme, success was redefined as working towards shared responsibility and mutual relationships. This illustrates the layered aspect of this PAR in terms of depth. Building on the concepts learned during the learning from success and double-loop learning workshops, the team was able to untangle how their assumptions and models connected to how they internalised the field, and that at the same time their actions shape or reproduce the field. This realisation was accompanied by a sense of power – a sense that the team could create an alternative future, for example, by redefining success as something that starts small. Based on this collective inquiry process, the team implemented several action strategies to reframe the volunteer role towards being changemakers (see chapter 6 and 7 for more details).

3.6.3 Learning track 2 – Community actors

One of the goals the team formulated was to improve their relationships with community actors. They underlined that they wanted external actors to 'appreciate their work'. Despite their efforts to keep people involved and informed, they kept hearing that people do not know them. As mentioned earlier, the team was eager to find out from the perspective of community members and government officials how they would like to be involved. A micro-innovation that the team proposed was to invite community representatives to the volunteer training to lead the sessions on stakeholder engagement. This did happen during a refresher training of the 2018 cohort. A teacher and parent were invited to share their recommendations on how to collaborate effectively. In addition, during the same training volunteers were given Easter cards to share with various members of the community. Through these cards, the team wanted to tackle their habit of reaching out to community actors at the point that they need people to partner in an activity. The team was hoping that these cards could broker a better, more personal connection. One of the PAR team members was assigned to make follow up calls with some of the actors to find out how these cards were received and whether they changed their perception of the NGO. Unfortunately, the report of this person got lost while he transitioned to another job. During the April PAR meeting, the volunteers mentioned that the cards received mixed responses. Some found the cards used as coasters, for example. A small achievement can be noted, however, handing out the cards did become a first-time interaction with some of the community members, providing them with an opportunity to get to know people around.

To learn more about the NGO-community relationship, we designed a sub-study to map how community actors would like to be engaged in collective learning. This exercise, however, presented a couple of dilemmas. First, earlier in the research, the team had problematised not receiving critical feedback from community actors – they felt their involvement would hinder gathering authentic views. Secondly, PAR as an approach seeks to solve problems of concern to participants; yet in this case, an NGO raised the issue, not the community. We did not want to assume that the problem experienced by the NGO was their problem too, or that they were necessarily interested in this research (Arieli, Friedman, & Agbaria, 2009). To overcome these dilemmas, the

NGO team and I opted to conduct this as a separate sub-study of the PAR. I recruited three research assistants to form an external research team and widened the research tools to inquire about all NGOs, not just the case-study NGO. Most importantly, through the initial research activities, the research team investigated whether the problem identified by the NGO mattered to the community and provided an opportunity to influence the direction of the research.

Table 10 lists the research activities that emerged in this trajectory and who participated in which activity. Inspired by field theory, the research methods aimed at mapping the status quo of the field of youth development in the village. For example, what did youth consider meaningful issues, which actors were important in this field, who does what and how do youth and other community members like to relate with the NGOs operating in their village? I developed the research instruments and invited some of the volunteers to help contextualise the questions. A Focus Group Discussion (FGD) tool was developed for use with a female youth group. This included visualisation exercises; participants were asked to map their village and important places for youth, as well as their knowledge networks. The interviews were conducted in a semi-structured format and participants were selected through a snowballing method.

Table 10 Community research activities and participants

Seq.	Activity	Method	Participants
1	Data collection about community perceptions	Focus Group Discussion	Female youth group members (9)
		Interviews	Local leaders (2) Young male (5) Young female (5) Elders (5) Business people (3) Health worker (1) Head teacher (1)
2	Community dialogue	Dialogue, brainstorm	Young male (4) Young female (5) Adult male (3) Adult female (4) Incl. local leaders, religious leaders, elders, health worker, teacher, youth
3	Committee meetings	n/a	Community representatives (4)

4	Community-NGO meeting	Community-NGO meeting	Community members (37) NGO representatives (15) District and local government officials (4)
5	Spin-off	Field notes	n/a

Together with the assistants I analysed preliminary insights from interviews and FGDs and presented their insights for feedback during a community dialogue using the local language. At the end of the meeting, members brainstormed recommendations for themselves, NGOs and government actors. Based on the proposal from participants in this meeting, a community-NGO meeting was organised to present recommendations to NGOs operating in the village. After this meeting, the committee met a few more times to discuss follow up steps. A research assistant transcribed and translated all recorded interviews and meetings. During the final round of analysis, I used ATLAS.ti guided by the questions set out in the previous section. Through cycles of open and axial coding (Flick, 2009), six code groups emerged: Youth development status quo, Actors, Relationships aspects, Perceptions of NGOs, Positionality and agency and Space factors. An important layer of analysis occurred in the conversations with research participants throughout the research activities and reflections with co-researchers. One of the co-researchers mentioned for example that the defensiveness of NGOs during the meeting was due to power dynamics; they felt they had to save face in front of the local government representatives. On the one hand, the community-NGO meeting modelled a community-driven collective learning mechanism. In a way it held up a mirror for the team – reflecting whether their assumptions about their programme model and community engagement had been right (see chapter 5). On the other hand, however, when it came to engaging external actors differently and setting up new spaces for collective learning the team implemented no major innovations (see chapter 7).

3.6.4 Learning track 3 – double-loop learning capabilities

Whereas the on-stage innovations can be grouped under tracks 1 and 2, a third track emerged with back-stage innovations that helped enhance our reflexivity skills. First of all, the regular PAR meetings formed a platform to discuss topics that were normally not addressed.

> There are so many things that we have discussed in this action research, that otherwise we would not have had time to talk about them. And it's so

> interesting that when we sit, […] how many aspects would come up and you're like: "wow!"
>
> Andrew, support team member, action research meeting December 2018

Secondly, several workshops aimed at modelling double-loop learning methods. For example, the double-loop learning workshop and the learning from success workshop. The latter was co-facilitated by Victor Friedman and myself. The participants include members from the programme team as well as other local office team members. After a brief introduction of 'self-in the-field', Victor facilitated an example reflection session using learning from success (inspired by Schechter et al., 2004). One of the volunteers shared about a situation she considered a success and participants collaboratively distilled what elements helped achieve the success. As a spin-off from this reflection, the team investigated the monetary expectations and the transactional character of their relationships with external actors (also see chapter 6).

Parallel to the PAR activities with the programme team, we organised several all-staff sessions to keep the wider team up-to-date, but also to disseminate the double-loop learning methods. In November 2018, for example, we facilitated a short session with all staff on learning from success. In May 2018, we used the force field analysis method which helped operationalise field theory in a concrete manner (Ramalingam, 2006). At the start of the session, we presented preliminary research findings and invited the organisational members to connect these insights to their programme strategy and work plans for the upcoming year. After brainstorming recommended changes, the members voted on the four most important changes that should be made. In groups, participants conducted a force field analysis to understand what pressures may work against the change and what opportunities could be leveraged to support the change. During an informal check-in, one of the senior managers informed me that she reviewed each programme work plan for signs that learning has been incorporated for the next year. Overall, the various skill-building workshops were very helpful. Not only did they generate key data and insights, but they were transferable to other learning platforms. In the closing phase, I made a final attempt to integrate as many of the insights and skills as possible, as I describe in the section about stage 5.

3.6.5 Layers-of-depth

Working with one programme team in stage 4 proved to have several benefits for the PAR process. The team had a strong base of shared experiences, and their programme provided a direct platform to try out innovations, while it was relatively easy to access team members in one place. By focusing on the lived realities of one team we were able to zoom in on smaller and more concrete, situations. Rather than discussing general themes and espoused theories, we were able to dig deeper to understand the team's mental models regarding collective learning with external actors. Ultimately these micro-situations ended up revealing how the wider field was internalised and how this affected the work of these NGO practitioners; members discovered their blind spots. The back-stage spaces facilitated reflexivity, opening up the realm of possibility and giving the team a sense of power and agency. They felt less helpless in the face of the dominant paradigms in development cooperation. "Thinking spatially gives expression to the fundamental plasticity of the social world because the limits are not fixed, but rather defined by our imaginations and ability to put imagination into action through these relations" (Friedman, 2011, p. 13). In my reflections I have wondered to what extent this depth became an organisational asset; individuals who had participated in double-loop case interviews felt empowered, but to what extent did this translate to organisational change? Whilst I am not able to provide a concrete answer to this question, I can imagine that the agency of individual members found their way to effecting smaller changes. In chapter 7, I discuss the durability and spread of the PAR outcomes in more detail.

3.7 Stage five – Closing

Ernie Stringer advises action researchers to start their action research project with an exit plan (Dustman et al., 2014). At the start of the journey, I did sketch an exit plan; I was especially keen on keeping the leadership team involved throughout and making sure the innovations generated through the PAR were taken up at the organisational level. I was also looking forward to bringing back the other NGOs involved in stages 1 and 2 to make sure every participating NGO could benefit from the in-depth insights. Before I elaborate more on the research methodology used in this stage, I want to clarify how I knew the time was ripe to exit. I realised that the difficulty with PAR is that new ideas keep coming up and given the rapid changes in the organisational context (and beyond) new questions keep emerging. However, at the start of 2019, making up the balance, I realised I had sufficient insight to answer the research questions we set at the start. Secondly, the programme team had undergone several staff transitions, leaving behind very few original co-researchers and making it difficult to keep up the collective inquiry community. For practical reasons too, it was the right time to close my PhD study.

Therefore, around April 2019 I started initiating a few closing activities. These were aimed at concretising some of the insights towards possible dissemination within the organisation. And second to gather from the co-researchers' view what the research had been able to achieve in their practice and thus to evaluate the various activities that happened back-stage and on-stage.

At the PAR team level, I conducted semi-structured interviews with four available co-researchers in May 2019. These interviews covered topics such as most outstanding research activities, their views on how participation was facilitated, research outcomes and general feedback for me on my role as the facilitating researcher. In the same month, I facilitated a reflection workshop with six team members and three volunteers. During this half-day workshop, I created *a trip through memory lane* by pinning sheets on the wall with all research activities in chronological order. Since there had been some staff turnover and not everyone had joined the PAR at the same time, I paired up *new* and *old* team members to discover the activities and bring back memories together. During a plenary session, participants shared their key insights. This yielded new knowledge for me regarding changes made outside of my horizon. Johanna for example mentioned a change in the way community partners are identified and involved.

> Oh, my memories I will start with eh how we do our stakeholder engagements, eh and one thing that stood out and kind of a learning is now working with the different departments than working with the individuals. [...] And I think it somehow helped and it improved our eh, stakeholder eh, it pulled the stakeholders to support the different activities than being attached to a specific individual. Because at times they are not in office and they won't be able to provide the required support at that time. But if you're working with a whole department anyone can be assigned to support like the different organisational activities.
>
> Johanna, staff sharing office with programme team, closing workshop

During this workshop, members also raised questions to find out what stuck and what did not happen as planned. One of the volunteers, for example, asked if new systems were taken up by the NGO in incorporating some of the findings. I passed this question back to the programme team who confirmed that some systems were updated, for example, the support and supervision check-list was revised to facilitate more meaningful conversations with the volunteers. I also probed further to find out why certain things were not implemented (see chapter 7). At this stage, the team requested me to make some noise when sharing the results with the senior management team.

At the end of May 2019, a closing workshop was organised for the senior management team. Organising this workshop was difficult because there were several vacancies in the leadership team. The meeting did happen with four members some of whom were in temporary or acting positions. Using a PowerPoint presentation, I presented the research findings along the three learning tracks and invited the leadership to think about the next steps. Given the fluidity of the acting senior management team, it proved to be a difficult period to follow up on implementation or consideration of the recommendations. Both closing workshops were recorded with the permission of the participants and transcribed, forming helpful data to reflect on the research process in general.

Another closing process happened at the community level. I set up a meeting with the district official in charge and the community organising committee to ensure he was informed about the community's innovative idea of establishing a coordinating committee. Afterwards, together with the committee, I organised a football competition for young men and women in the village. This was meant as an appreciation for participation by the youth as well as to visibly announce my exit. The idea of establishing a coordinating committee at the Parish level was implemented by the organising committee, but after a few gatherings died down.

3.8 Reflections on phronetic PAR

3.8.1 Cutting through the layers of our lived realities

As mentioned in the introduction, it may not be possible to plan and predict every step in a PAR but in hindsight the steps make sense. To structure my recollection of the research trajectory, I introduced two types of layering, layers-of-width and layers-of-depth. Over time, our interchanging phases of action and reflection meandered into exploring the influence of the wider field on micro-situations and investigating how agency could be fostered to change problematic elements about the field. In a way, the research followed a funnel design moving from the broader challenges in the field of lifelong learning for development to a community of organisations and one programme team in particular. Through a reverse funnel, these micro-realities were reconnected to the broader fields; through reflexivity with programme participants but also by writing this thesis. Both forms of layering helped the co-researchers to produce meaningful knowledge about the organisational learning practice of NGOs and possible strategies for double-loop learning. They highlighted barriers at the levels of mental models, as well as field dynamics. The team was also able to innovate how the organisation collaborates with external actors, especially by reframing the volunteer role as catalysts for double-loop learning. Innovations also occurred outside of the view of this PAR, triggered by the communicative spaces facilitated from stages one through five, and participants developed and implemented new strategies. Other ideas never materialised, and to some extent we were able to explain why (see chapter 7).

There is also something to say about visualising the PAR process. At the start of the PAR journey, I used the conventional PAR cycle to illustrate the research stages to the team. During one of the reflection interviews, a co-researcher mentioned it would have been helpful if I revisited the phases and helped the team anticipate where we are going next. To him, it was not always clear where we stood. The layers, thus, might have made sense to me as a facilitative researcher who was in every single PAR space and activity, but since participation fluctuated over time it was not clear to all participants. I would recommend other action researchers to embrace emergence, but also make an effort to visualise or articulate the journey more explicitly to participants. In this PAR all steps were documented and analysis occurred continuously, but this was not always shared broadly to keep members up-to-date or lined back to the process framework. This is partly because I did the research as a part-time student and could not always keep up with transcribing, analysing and interpreting the findings in-depth as fast as perhaps was needed. The other reason why stages could have been blurry is because of the similarities between the research topic and the research approach. On the one hand, it helped to model methods that could also be used for continued organisational learning. On the other hand, participants may not always have been aware about how the back-stage spaces were linked to organisational learning. Therefore, it might be helpful to build-in reflection on spaces and make the movements between on-stage and back-stage more explicit.

As Friedman and Blaak (2016) suggest: "the ability to create containers and the ability to open a space for dialogue, constitute the central features of the craftsmanship of participatory research" (p.126). In regards to opening a communicative space and including participants I found the idea of *un-normalness* useful (Wicks & Reason, 2009), trying to shake things up to keep distorting power dynamics at bay and help participants make sense of their world. I intentionally tried to avoid replicating the usual learning spaces for NGOs which often involve a conference room in a hotel. Metaphors, unique venues and co-facilitation all turned out to be ingredients to facilitate learningful conversations. Participants also appreciated the sessions where creative methodologies were modelled (rather than just mentioned/talked about) as a means to build their own capacity in facilitating learning spaces. Yet, other times, we chose to merge our PAR spaces with the existing learning spaces as a means to access participants in a cost- and time-efficient manner. I was able to utilise multiple tools that other action researchers had developed but also worked on contextualising these and creating my own (such as the *elephant map*). The research stage guided me in selecting and modifying or creating these methods, as well as the mentoring I received from my supervisors and other members of our Youth, Education and Work research network. It was further helpful to reconnect to the literature throughout the research process to explore what others have done at various stages of action research and read reflections of other action researchers about managing power dynamics and other challenges. I may also have been helped by my prior experience in curriculum design, training and facilitating capacity development activities. However, this research stretched my skills set, sometimes uncomfortably pushing me to venture into a methodology that dug deeper and wider while keeping the participants involved amidst their busy schedules.

One factor that undeniably affected the rhythm of going in-depth and in-width is that the group of co-researchers fluctuated strongly throughout the phases of the research and included only internal members of the organisation. Due to the design of the study, those engaged earlier in the research disappeared to the background and did not maintain the same level of engagement. This was an intentional compromise to enable an in-depth inquiry. The feedback committee could have been implemented more systematically, perhaps through more light-touch interactions such as a shared lunch or virtual meetings. Moreover, one could argue that a PAR on learning with external actors should include these external actors as co-researchers. Besides the community learning track, the people in the room were all NGO practitioners. Adding external actors as co-researchers could have been interesting, albeit, I felt the research was sufficiently meaningful with the current group of co-researchers with temporary spaces being created for the voices of other actors. However, I do also wonder what would have happened if other actors were involved as co-researchers and were able to influence the way the research was executed directly. Perhaps, as had happened with the volunteers, this involvement could have strengthened the mutual understanding amongst the parties. Or it could have expanded innovations to include government and community action. As a consequence of the decision not to involve external actors as co-researchers, the double-loop learning efforts centred mostly around the practitioners and their theories-of-action. This led to changes in how they shape organisational learning with community actors, but it is not traceable whether double-loop learning occurred on the side of external actors. Though the fluctuating community of inquiry had its challenges, this research illustrates that a single and multiple case study approach can add value to a PAR process. By conducting a multiple-case study, the field dynamics around double-loop learning can be better understood for the general field of education NGOs, and the action scripts can be followed up more at the single case study level.

3.8.2 Ethical considerations

When it comes to ethics in PAR, authors commonly refer to authentic participation and catering for power dynamics (Angucia, Zeelen, & De Jong, 2010; Boog et al., 2008; Tumuheki, 2017). In the case of my PhD research, I also had to account for the more conventional ethical procedures as per the research regulations in Uganda. I had to find a way to cater to both. A dilemma herein was that the PAR was strongly emergent and the GUREC and UNCST required detailed protocols. Further, I could only prepare this protocol when the research process had been co-designed by the wider research group. This may have been 'late' in terms of clearance but did offer a review of a co-created research design. If I had presented a proposal sooner it might have been misaligned to the realities of those affected by the problem.

During the process, I made sure all participants were given the power to make their own choices and that participation was voluntary and fully informed. This meant that every participant or co-researcher could always opt-out or choose to skip activities. In most of the interviews,[8] I and the research assistants managed to first build rapport before conducting any formal interview through informal interactions. This was to ensure that participants felt comfortable enough to articulate their preference for the interview

[8] Only with the actor consultations of 2017 did I have to conduct interviews during a first interaction with a person.

setting or to opt-out. For those cases where group meetings were organised in the community, consent was sought in written form and we explained the research goal and terms of participation in the local language. During all engagements, I was flexible around the use of the voice recorder. For example, with the PAR team I continued to seek consent for recordings during every meeting. For interviews and FGDs I and the research assistants would first strike the conversation and once the participant was in the flow request permission to record the conversation. Consequently, some audio recordings were incomplete, missing the start of the conversation (though this was captured in the interview notes). In my view, this was justified given it promoted free choice of the participant, ensuring they felt comfortable enough to say no. For those participants with e-mail addresses, I always shared the transcript of the interview. Only a few participants responded; some chose to highlight certain quotes I should not include in reports verbatim, others added some afterthoughts. Whenever the participant was not comfortable being recorded, we would not record any audio but take written notes.

To ensure my interpretation of the data and my knowledge claims were valid, several spaces were created for co-analysis or responses to the findings. Just like organisational learning spaces, these spaces are not free from power dynamics – in which my positionality as a white PhD researcher also plays a role (Van der Linden & Zeelen, 2008). I cannot claim that the spaces for validation were free from bias, but these spaces were usually lively and participants contributed varying views, regularly disagreeing with me and each other. It could be that members who were generally less interested in organisational learning chose not to participate, which could have biased the findings. In this process we may have also excluded important voices from the co-research process. In the village, for example, we missed girls' voices in the community dialogue probably due to local power dynamics. We were able to overcome this in the community-NGO meeting by granting youth the opportunity to speak first. However, there were definitely community members who could have added interesting views too but chose not to participate, maybe because of earlier experiences with research and NGO meetings. The final knowledge products of this research were also presented for validation. For example, by sharing a draft paper with co-researchers or co-authoring a paper with a co-researcher. All in all, I hope this chapter has illustrated how the voice of research participants shaped the research trajectory – demarcating a democratic process of knowledge generation and knowing (Boog, 2008).

3.9 Conclusion Operationalising reflection-in-action through phronetic PAR

As a first-time action researcher, sometimes, I experienced the emergent PAR design as uncomfortable. The level of uncertainty sometimes made me doubt my capabilities; was I doing the right thing? Looking back, things clearly added up and I hope this account inspires other young action researchers to take the plunge. Peters (2017) refers to a metaphor that Freire and Horton borrowed from the Poet Machado: "make the road by walking", to embrace that action research is a process that unfolds itself as we go. This is exactly how I experienced the process, at every twist and turn of this research process was a partner-in-learning who added their stamp onto the process. As a third-person action researcher, I enjoyed my role as a facilitator, zooming-in and zooming-out and facilitating in-depth conversational spaces. In chapter 2 I illustrated the merit that alternative epistemologies of practice seem to have to help us overcome the complex problems in the field of lifelong learning for development. In this chapter, I proposed a phronetic approach to PAR as a potential way to work consistently with alternative epistemologies of practice such as reflection-in-action (Schön, 1983) or participatory adaptive pluralism (Chambers, 2010). In the following chapters I present the research findings generated through this methodology.

Intermezzo 1 | A Co-Researcher's Journey: Recollections of the Participatory Action Research

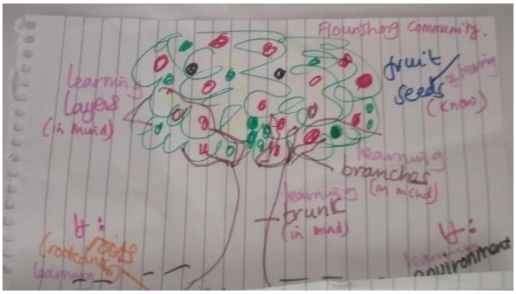
By Sophia Irepu, Development Worker, Organisational/Project Management Specialist.

Out of the many rich components of Marit's research, the most captivating for me was the research methodology and the commitment with which Marit handled it. I feel I would have done us a disservice if I did not give all of us a sneak peek into what it looked like from my side of the process.

The journey started on 16th May, 2016, when I was barely two months into my new role and I got the invitation to join a dissemination workshop about organisational learning in NGOs. Having experienced research validation meetings before, I thought I knew what to expect, but this meeting surprised me. When I reached the Ntinda School for the Deaf in Kampala, standing at the door was Marit being warm and she welcomed me to enter the room and make myself familiar with what was displayed on the walls. Being the curious one, I immediately took her up on the offer and took a gallery walk around the room. When all members had reported, Marit welcomed us all and explained the choice of venue for the meeting: "to give us a feel of what it is like to be a learner, so that we can be able to connect with the core of the research", which was organisational learning in education NGOs towards improving education and learning. From then on, we used multiple participatory methods to dig into the findings. We were able to learn about organisational learning and to see a different array of applications across the organisations. To come up with a common vision on learning that later became the topic of focus for the study, we were asked to illustrate what learning looked like from our

It never crossed my mind that the journey would stretch beyond this workshop, but I thought to myself, the research is interesting and she is employing a unique approach.

perspective. So, I drew a tree that had different shades of leaves and fruits to indicate the different forms and levels of learning depending on its environment and enabling factors. Other participants also shared and explained their visions of learning. At the end of the day, we were asked some evaluation questions to identify how we would like to be engaged in the next steps of the research. It never crossed my mind that the journey would stretch beyond this workshop, but I thought to myself, the research is interesting and she is employing a unique approach.



A few weeks later I was delighted to receive an email from Marit indicating that she would love for us to host a discussion on how to take the research forward. Days later we met in our boardroom with members of other education NGOs and together with Marit brainstormed broad potential research areas. During the brainstorm, Marit laid out a flipchart across the table and asked us each to feel free to write our ideas there, while we also shared them verbally. Members were quite animated as we discussed the research focus, characteristics of the case study NGO to be able to qualify, and the key question we would like the research to answer. At the end of it all, we agreed the research should focus on how NGOs can increase the space for learning amidst competing and strong influencing forces. This later came to be known as the "murky field of learning in NGOs", which informed the use of the Field Theory as one of the key theoretical groundings of the study. It is one of my favourite theories and practical illustrations of learning challenges to date. We then agreed to have Marit go and review these and use the checklist to determine the organisation that would eventually serve as the case study.

Imagine our delight when days later Marit called to inform us that our organisation had been selected for the case study and that it had met all the requirements. The Country Director again gave us the green light, with a proposal that since I had already been working closely with Marit, I could continue and be the focal person and co-researcher. Marit run me through what that meant and I was more than happy to take on the challenge.

From that point on it was a rollercoaster on actions as the research process took shape, with numerous meetings to agree on the practicalities of the research. Marit had me sign a consent form and co-researchers' agreement and we agreed on a procedure for selecting the project for study amidst an amazing pool of eight potential projects. The actual research work itself began with the orientation of the leadership team to get their support for the research process. Marit still proposed to host them at the Ntinda School for the Deaf and gave them the same explanation as to why that choice of the location, to my pleasure and amusement! Imagine people used to sitting in the boardroom making big decisions for the organisation now seated in a classroom. The excitement in the room was of World Cup proportion, with each member animated and amused at being seated behind a school desk like a pupil, as Marit took us through what learning looked like in the organisation. We discussed this at length and zeroed on an area of potential research for the organisation: the out of school youth learning curriculum. With this done it was agreed that Marit engages all staff in another workshop to explore this further.

> *Imagine our delight when days later Marit called to inform us that our organisation has been selected for the case study and that it had met all the requirements.*

When the workshop drew closer, Marit met up with me again to discuss how we could go about the research engagement with the staff. We agreed to administer the DLOQ to all staff to establish in a broader sense what learning really looked like from the perspective of the staff. This was done and presented at the workshop, showing that there were areas of learning the organisation was strong in but also others that it could strengthen. It was at this point that realisation came to the organisation of how much more informal community-driven learning we needed to do beyond the formal structured set up we were used to. Marit then took the staff through a practical session where she asked us to map what our learning looked like with others, using the elephant map and this turned out be one of my favourite applications of the research to date.

This was the best part of the research that I loved the most because here we got to challenge ourselves to bring out the best form of the study, generating rich insights from the data.

From that workshop, the research progressed to the case study project, where Marit had an orientation workshop with the selected project team to agree on the study area, which stakeholders to engage, what methods and tools to use, and the research questions. I also engaged as often as possible directly online or in physical attendance until the very end. With frequent touchpoint meetings with Marit for brainstorming methodology, emerging issues, preliminary data from the study among others. This was the best part of the research that I loved the most because here we got to challenge ourselves to bring out the best form of the study, generating rich insights from the data, which between ourselves we called “knowledge mining” because the more we looked at them the deeper we got and the more interesting discoveries we made.

Throughout 2016 up until 2019, Marit employed unique approaches to the study and exhibited a high level of organisation and collectedness. Part of us, yet not fully part of us, connected but disconnected, as I came to learn later from Professor Jacques Zeelen, her PhD supervisor. This was part of knowing when to zoom in and zoom out, drawing the line between when to participate to further understand the participants and their experiences and when to be the researcher, merely observing what was happening around her. All these generated great insights that have now become her PhD Thesis. I am happy to have been part and parcel of this unique process. We managed to produce three newsletters which were shared with the other education NGOs that were part of the process at the start as a way of keeping them connected to the process. We shared the same internally with all staff through the organisation’s email. Marit wrote research briefs that I always shared with the organisation’s management to keep them in the loop and on other occasions, Marit made presentations at the leadership meeting to offer direct updates. Together we have written an article that was presented at the ARNA conference in Canada in June 2019 and another for a journal submission for 2021.

Did we achieve our expectations of the process as an organisation? I would say: yes, and probably more. Did I as a co-researcher meet the expectations I had for the organisation and myself as an individual? Yes. At the organisational level, Marit helped us to rekindle and enhance an organisational fire that was flickering and getting lost in the formal processes of organisational learning, which I knew then that active participation in the process would help us achieve. At a personal level for me, she reignited the fire and need to rethink my perception of PhD study; I was scared of it because of what I had heard people say, but I have always wanted to pursue a PhD myself.

I got to learn about precious scholars like Victor Friedman – Learning from Success, Etienne Wenger – Communities of Practice, Networks and Collective Learning, Christopher Argyris – Organisational Learning and Theories of Action, and Cornwall and Ramalingam, who had done broad works on Organisational learning and fell in love with their work. Marit taught me that she had learnt from Professor Jacques that this is called "standing on the shoulders of giants" and I couldn't agree more. And in the true sense of the phrase, I conclude by saying that this research process helped my then employing organisation and myself, not only to "stand on the shoulders of giants" but to fly on their wings as well.