

Welcoming the Uncomfortable Now: Transforming Strategies for KM

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Abstract

The definitions and lessons of knowledge management (KM) are reviewed, along with their application in the context of higher education. Senge's (2005) emphasis on leaders as human beings is discussed, with examples from the author's life useful for being authentic and seeing habitual responses to organizational issues. In order to keep pace with the changing landscape of institutions, it is necessary to challenge assumptions about the higher education enterprise. To incorporate new KM tools such as storytelling and learning histories, leaders must challenge the traditional paradigm and recognize lessons from physics about the changing nature of knowledge. This transformation requires us to admit that we sometimes lie to ourselves, don't see the value of mistakes, and revert to the status quo because it is uncomfortable to change. New types of KM skills, such as sensing emerging patterns and what Scharmer (2002) calls presencing, are needed to focus less on the past and more on what is happening in the present.

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Introduction

There are many different, sometimes competing, definitions for knowledge management (KM). Their application to higher education/tertiary institutions depends more than anything upon the context in which they are used. There is no generic approach to KM that all organizations need to build upon; no one, best, or proper way to implement it. Despite what some vendors and consultants may imply to the contrary, there is no hierarchy of needs to be addressed. Rather, there are many different tools and approaches. The context in which they are applied is more important than following what scholars or practitioners may explain are best practices or requirements for success. When pressed, it must be admitted that there is no strong empirical basis to justify their conclusions. Rather, they are solutions looking for a problem.

Part of the problem of definitions is that knowledge itself is often hidden. Snowden explains that “We only know what we know when we need to know it” and that knowledge is both a thing and a flow (2002, p. 6). The real work of KM, therefore, is mostly invisible (Roell, 2004). The desire to think of KM in terms of applying technologies such as taxonomies, portals, and attention management systems is simply a mechanism for uncovering the mysterious. Too often, these methods to categorize and prioritize information fail to address the fundamental issues driving change, the relationships between people in organizational groups and roles and how they share knowledge.

In this essay, I present some of the KM concepts with which I am current engaged, including general lessons, the nature of leaders as human beings, challenging assumptions, and new types of KM skills that are needed, including what Scharmer (2002) and Senge et al (2005) call “presencing.” For a general introduction to KM in higher education, the reader is referred to Serban and Luan (2002), Milam (2001, 2006), Bernbom (2001), Oliver et al (2003), and Thorn (2001), among others.

This essay reflects an outline of thoughts first prepared for the Conference on Knowledge Management in Education: A Gateway to Excellence and Innovation in Africa held in February, 2006 in Pietermaritzburg, South Africa. It is recognized at the outset that the presentation and this essay, while informed by research and experience, are inherently subjective and human and therefore flawed.

General KM lessons

There is a popular literature about the lessons of KM which highlights the emerging global knowledge economy in a way that provides stark contrast to today’s traditional educational institutions. From McDonald’s to Wal-Mart to Amazon.com to Ebay.com, there are vivid

examples of changing the way knowledge is collected, coded, stored, and used to make it radically more efficient. McDonald's outsources order-taking at some of its drive-up windows to data entry clerks working from home who link orders to pictures of the customer car to maximize the number served. Wal-Mart creates its own supply chains, tracking items at every stage from production to stocking shelves to purchasing and initiating orders on demand based on real-time sales and driving the creation of new manufacturers. Amazon sells everything, either through its own warehouses and distribution channels, or through third-party sellers who leverage customized tools to target and attract customers and track sales. Ebay is the ultimate in customization and disintermediation, breaking apart the supply chain, mining customer satisfaction ratings, and creating a myriad of free tools to leverage its resources for direct person to person sales (Friedman, 2006).

Imagine if a university could outsource data entry and support for registration to ensure that students do not experience delays and that as many students are served as quickly as possible. What if textbooks were printed and made available on demand at the lowest bid based on institutional negotiation with publishers? Vendors would sign up online and have customized tools to make their products available to students and their ratings could be compared with customer satisfaction data. What if faculty promoted and taught their courses as if they were products for sale on Ebay? These visualizations of how general KM lessons could be realized in a higher education setting are coming true now at institutions that are questioning how they do business and are willing to take the risk of dramatically reengineering their processes and procedures. The traditional supply chain of higher education is quickly becoming outmoded.

Thomas Friedman's (2006) description of the flattening and changing of the global knowledge economy in The World is Flat, like Malcolm Gladwell's Blink (2005) and The Tipping Point (2000), helps break apart assumptions about the nature of knowledge. There is an inner, gut wisdom based on experience and tacit knowledge that is hard to codify. Myths about planned change and the perception of a rational linear planning process are exposed. What emerges is a better understanding of whether work is inherently fungible and can be broken into smaller pieces to be routinized or if there is some innate function of value-added synthesis that requires the specialized training and understanding of knowledge workers.

The distinction is not necessarily driven by the complexity of the field or discipline of knowledge itself, as illustrated by the outsourcing of radiology, accounting, and computer programming to Asia and South America; but by whether there are higher order KM processes involved (Friedman, 2006). This is important because the application of KM to higher education institutions must go beyond data-driven, information technology to the use of knowledge as what Drucker terms the key competitive advantage (Stephenson, 2001). Otherwise, KM is simply the same old form of information management with different words (McLaughlin and Howard, 2004).

Friedman (2006) uses the term versatilist to describe someone who can leverage the specific knowledge and skills of a field or discipline while being able to adapt and apply them to other areas of knowledge. Gartner, Inc. describes the following:

Versatilists are people whose numerous roles, assignments and experiences are enabling them to synthesize knowledge and context to fuel business value. Versatilists are applying their depth of skills and experiences to a rich scope of situations and challenges and implementing their cross-organisational insight to flesh out teams and fill competency gaps (Gartner, 2005, p. 1).

The term infomediary is also useful to describe this KM role. The author describes infomediaries within higher education, particularly in the role of institutional research (Milam, 2005). Costello (2000) describes the infomediary as someone who “creates or manages systems to connect employees with the knowledge they need” (p. 33). Infomediaries may have a variety of titles and therefore “may not be designated on the org chart as knowledge controllers,” but they “keep their finger on the pulse of the knowledge flowing around the organization” (p. 33).

Other significant organizational lessons have been learned that are central to KM strategies. These include the recognition that hierarchical leadership models are grossly inadequate for maintaining the fluid, interwoven relationships and reporting needs of today’s complex institutions. Web-like models are much better at ensuring effective connections and communication within and between semi-autonomous teams. Too often there is a tendency to look for heroes, people or vendors or products that will come in and deliver the organization from its current problems and magically implement a solution. This resembles the myth of deliverance in American politics which is outlined by Harrington (1986). The heroes burn out; they prevent others from developing the skills they need for long-term growth; people and systems get blamed inappropriately; the solution is lost in a mire of immature implementation; and nothing really changes.

Senge (n.d.), Milam (2005), and others document the role of mistakes in the KM learning process. This author explains that “Despite their commitment to promoting student and adult development, colleges and universities do not necessarily promote the kind of ‘psychological safety’ needed by faculty and staff to overcome the anxiety brought about by recognizing and valuing mistakes” (Milam, 2005, p. 65). Mistakes need to be valued, but the culture of institutions doesn’t want this kind of honesty. Instead, mistakes are blamed on someone or something other than the individual, when the phenomena which led up to the mistake is really systemic. Mistakes and problems need to be viewed as opportunities and insights. They are the critical incidents when learning can occur.

Leaders as human beings

Examining profound change in people, organizations, and society, Senge et al (2005) quote Chinese Master Nan Huai Chin that “if you want to be a leader, you have to be a real human being. You must recognize the true meaning of life before you can become a great leader. You must understand yourself first” (p. 180). When Senge et al analyze the knowledge management strategies in organizations, they focus on the importance of leaders who are authentic, honest, and human. This is what McGregor (2006) first presented in 1960 in The Human Side of Enterprise, contrasting assumptions of Theory X and Theory Y about motivation and managing people. This is best understood by looking at one’s own vulnerabilities and being open emotion-

ally, willing to talk about the way things really are in an organization with all of its mistakes and failed attempts. It means examining one's own actual work with a critical eye to what is going well and what is not.

In approaching the kind of authenticity expressed by Senge et al, McGregor, and others, it is particularly helpful to use issues in one's own life as sources for learning about organizations. For example, as a parent, much of the work I have done on myself has come about because of family therapy in adopting hurt children who were neglected and abused. Just as we work on family of origin issues in therapy, I think there is a kind of "organization of origin" at work. Based on our early organizational experiences, we develop habitual patterns and responses to typical issues that shape how we react.

I have been forced by our children's circumstances to identify and address the dualistic thinking of borderline personality disorder (BPD). The one approach to the treatment of BPD which is empirically derived, based on the research of Linehan (1993), involves learning to walk a "middle way" between extremes that is essentially Buddhist in nature. This involves trying not to automatically label everything as good or bad; being open to what is, without having to react to it; and learning to see the constant flow of thoughts and emotions which take place in the mind without having to be overtaken by them.

Similarly, there are metaphors for organizational life in the work we have done to understand reactive attachment disorder. Children who have never bonded with a maternal figure in the first eighteen months of life are hard wired into a hypervigilant lack of trust. Eventually, the closer they get within an intimate family setting, the more they feel like they are going to die. These children cannot form healthy attachments, especially to parent figures, and show indiscriminate sociability. From my interactions in thirty years of work, much of them at higher education institutions, I have to wonder whether some vice presidents have attachment problems.

Somewhat surprisingly, when something like a psychiatric hospitalization takes a child out of the family setting, the sudden quiet is very uncomfortable. I've learned that there is a certain amount of "addiction to uproar" which comes from living with the prolonged chaos and confusion of caring for a hurt child. I think there is an addiction to uproar in organizations as well, with the highs and lows of new policies, new programs, and financial instability. One has to learn to see the pattern and consciously be led into a healthier way of responding. In meetings about educational planning for our children, I find myself having a sort of post traumatic stress disorder (PTSD) response developed from all the previous battles we have fought for funding and services. This prevents me from seeing things clearly and makes me feel sick inside. The response can be out of proportion to the situation. I think I leap to conclusions at work too, not seeing what's taking place in the moment because I respond based on previous experiences and feel overwhelmed.

There are awkward moments in communicating about projects when both sides have very different perspectives. In this, it doesn't help to blame the other person. I've learned over time to take responsibility for the problem, even if part of me still clings to righteous indignation that I am being wronged and misunderstood. It is amazing how taking responsibility and accepting the consequences disarm the situation. The discussion is uncomfortable, but authentic. If I don't get

caught up in worry about the outcome, I can rest with whatever happens and be honest about my perspective without reacting emotionally. Although I am not happy about what occurred and feel upset about it, I am also not wracked with fear and worry, not replaying it over and over in my mind to somehow may it work out differently.

There are habitual patterns at work which prevent us from being honest about the addiction to uproar, attachment issues, organization of origin, and PTSD responses to organizational issues. Like the adult child of an alcoholic, we are taught to show the outside world a bright, intelligent, highly successful, and happy organizational family. There is no reward in being honest about what is really going on with our work. Yet this is what is desperately needed. To do this, we need to be authentic, honest, and willing to work on ourselves. This can't happen just because we want it to, though. We need support groups and, sometimes, the organizational equivalent of in-home therapy.

This includes talking about things the way they really are, telling stories about work, and putting together learning histories about how the organization addressed a problem – with all of its messy contradictions, relationship and power issues, and missteps. This recognizes that it is all right to be uncomfortable and dissatisfied. Too often, we lie to ourselves that things are going along well when they are really not. We don't want to see the conflicts in our lives, at work or at home. While we may be forced to face or are confronted with them at home because they are so close, we hide them at work in the whirlwind of relationships, roles, and projects that obfuscates the issues. Since everyone else is doing the same thing, no one notices how stuck we are.

There is no incentive to grow personally in organizations. Yet what forces us to change in our personal lives? Sometimes we get very focused on what is important because of a health crisis. I was hospitalized twice last year with two near heart attacks, undergoing angioplasties and the placement of stents. It was amazing how I suddenly saw what was important. I must admit that organizational issues at work just didn't concern me compared to thinking about my family. There are other times besides health crises which bring a forceful clarity to the mind, such as being in danger or being in love. There are other critical incidents such as graduation, being in an accident, the birth of a child, the life-threatening illness of a loved one, marriage, and death which bring us up out of our normal everyday selves, time seems to stand still, and we see things in a completely new way. We are able to be present in the brief gaps between all our mental chatter. Out of these moments comes an intense gratitude for being alive, whatever happens to us. This is what we need to reclaim for ourselves within our organizational lives if we are to be fully present and awake to what Senge et al describe.

The key to this is in identifying and understanding our habitual patterns to organizational issues, such as being overwhelmed or overloaded with work, being misunderstood, being blamed, being the messenger of bad news, being disheartened by how little our efforts make a difference, and feeling unappreciated.

Since it is so difficult to grow and change at work, we cling to the status quo. We want things to stay the same, to sink back into homeostasis. We react with black and white, all or nothing thinking. We jump to conclusions without taking time to meditate or reflect. We don't build attachments to the people we work with because it would be painful to let them get close

and then be hurt again. We are constantly functioning in reactive mode, looking for quick fixes to solve problems so that we do not raise any more uncomfortable issues. It is these habitual patterns which we must recognize in our work life and address through metaphors such as raising children or an illness.

Challenging assumptions

The landscape of postsecondary institutions is changing dramatically. It may not feel this way at an individual campus, but is seen in the challenging of many assumptions that were once sacred but are now being seriously debated. These include ideas about the use of technology in teaching, tuition charges and hidden subsidies, affordability and financial aid, transparency in governance, faculty roles, the use of learning teams, educational brokering and advising, creating pedagogical content in a variety of formats including learning objects, sharing resources within and across institutions, personalized learning, competences and portfolios, outsourcing, and the awarding of credentials.

Entirely new types of institutions are emerging which are much more geared to student needs, with hybrid models that combine online and site-based learning with flexible calendaring. These new institutions are very different from traditional colleges and universities in that they exist primarily for meeting student need. When pressed, many administrators and faculty must admit that their institutions do not truly exist for students, or they would be a very different kind of place.

To think in new ways about the changing landscape of institutions and the authenticity of organizational life, we must challenge our assumptions, something which is not encouraged at all in our professional lives as we work furiously to maintain the status quo. Snowden (2002) describes the “entrainment of thinking” that occurs when new knowledge is not accepted and how entrainment can be disrupted by examining the assumptions behind it. For this work, it is useful to think about paradigms, from Kuhn’s (1970) Structure of Scientific Revolutions to Burrell and Morgan’s (1979) Sociological Paradigms and Organizational Analysis. This author’s previous research documents the functionalist paradigm that dominates the higher education enterprise (Milam, 1991, 1992). The process of socialization and professionalism in graduate school, coupled with the disciplinary gatekeepers who control the conference and publication outlets, serves to maintain the existing paradigm.

Senge et al (2005) explain that this level of change involves what Bohm calls “hanging our assumptions out in front of us” (p. 29). In this, we are not well served by our propensity to label categories of things as good or bad. We must also recognize that the divisions of knowledge into disciplines, fields, sub-fields, and specialties is an artificial fragmentation. “Classical dichotomies are conceptual illusions,” explains Overman (1987). The functionalist assumptions run contrary to the lessons of physics and quantum mechanics which are showing us the complex, holographic, indeterminate, and perspectival nature of knowledge (Schwartz and Ogilvy, 1979).

One of the most common manifestations of paradigm dissonance is the use of complementary medicine. Some physicians have begun to include an holistic approach with their traditional allopathic medical model. Yet the use of homeopathy, acupuncture, neural therapy, and other alternative modalities cannot be explained within the allopathic paradigm. The most fundamental assumptions are challenged and cannot be resolved. Fortunately, the efficacy of helping the patient overcomes the inherent obstinacy about methods which cannot be understood and may be little different than placebos. It is interesting to ask allopathic physicians how and why they include alternative treatments that are not supported in the medical research. Often it is because there is a strong connection between the physician and the patient, with caring and support, perhaps even a spiritual dimension. It is also because the remedies, particularly homeopathic as opposed to herbal which can have contraindications with prescription medications, will do no harm.

In looking at the kinds of transformation which take place as we challenge our assumptions about the nature of knowledge and work in higher education, there are other literatures which inform our thinking, including adult and student development theory. William Perry's (1970) classic student development model, while linear and representing a nascent point in the field, helps us understand the move from dualism to multiplicity to relativism to commitment. How does this ever-expanding view of the world play out in our lives? Similarly, the work of Gilligan (1982) and Belenky et al (1986) helps us see through the lens of women's ways of knowing. While this literature and perspective have evolved with post-modernism, there is much to inform women's leadership styles in organizations, styles which value connections and promote a web of inclusion (Helgesen, 1995). Sexism is still so pervasive within most organizations, including salary equity and the feminization of certain disciplines in higher education, that this topic must be addressed as one of the fundamental contradictions, along with racism and homophobia, which will eventually emerge from learning histories.

Change theory is another perspective which drives our understanding of how higher education evolves and how KM can be incorporated. The early strategies for change in colleges of Lindquist (1978) are idealistically linear and rational and have evolved into a variety of discussions of culture and organizational learning (Kezar and Carducci, 2001). Paradigmatically, these are critiqued by Clark (1985), who challenges the fundamental assumptions of the dominant functionalist paradigm and exposes tensions and contradictions in organizational strategies for education (Milam, 1991, 1992). Weick's (1979) concept of sensemaking is an in-depth critique of the appearance of rationality and can be seen as a call for storytelling.

New types of KM skills

In order to challenge assumptions and become more authentic in our relationship to organizational life, we need different types of skills. Two which are promoted in the KM literature are the use of learning histories and storytelling. Developed out of the MIT Center for Organizational Learning, Roth and Kleiner (1995) describe the learning history as a special kind of document, "a narrative of a company's recent set of 'critical episodes', a corporate change event, a new initiative, a widespread innovation, a successful product launch, or even a traumatic event like a downsizing" (Kleiner and Roth (1997, p. 1). While there are various structures which can be used, such as two columns – one for the narrative and a second for analysis, the important part

is that the document builds trust, raises issues, transfers knowledge within the organization, and helps create a knowledge base of mistakes, successes, and lessons learned (Roth, 1996).

The research on storytelling by Snowden (2005), Denning (2005), and others suggests that the story is a powerful archetypal tool with many possible features that can dramatically help organizations look at themselves and create change. Both storytelling and learning histories can be very profound. They bring the mysterious to us and, if they are done well, present images, actions, and speech about conflicts and tensions that rise and fall like a crescendo and decrescendo in music. They become a kind of bibliotherapy that changes the reader the way a great novel can.

These approaches are not value-free, despite any language about neutral observers. This is the veracity of naturalistic inquiry and ethnography, their exposure of the pretense of objectivity hiding behind numbers. The conflict and contradictions can be told and themes emerge as a kind of grounded theory building of what is working and what isn't with very complex, interwoven, and interdependent issues. This doesn't come about with the process of reflection itself (Roth and Kleiner, 1995). Reflecting on the past is described in Tibetan Buddhist literature as trying to write on water. Thinking about the future is described as trying to cast a net into a dry river bed. We might think we know where the fish are going to be, but our worry and reflection about the future are so far different than what it will become that the exercise is futile and prevents us from being awake in the moment.

Among other skills needed for this emerging strategy of KM leadership, there is the warm personal regard of Carl Rogers' counseling technique in mirroring and reflecting, the belief in human beings of McGregor's Theory Y, and the kindness and compassion of what Senge et al (2005) draw on from Tibetan Buddhism.

Stretching this understand further, Senge et al expand on a theory first developed by Scharmer (2002) about perception and change, breaking it down into seven processes or capacities: suspending, redirecting, letting go, letting come, crystallizing, prototyping, and institutionalizing. The U-shaped movement through these seven processes creates three activities: sensing or transforming perception, presencing or transforming the self and will, and realizing or transforming action. With the concept of presencing, we "become aware of 'a future seeking to emerge'" (Senge et al, 2005, p. 220). Scharmer also explains presencing as "when the highest possible future that wants to emerge is beginning to flow into the now" (Scharmer, 2002, p. 2). Presencing is "intimately connected with your evolving, authentic Self – who you really are" (Senge et al, 2005, p. 221).

Whatever will emerge, then, from work on one's self and steps such as storytelling and learning histories to document and address the contradictions and conflicts of organizational life is dependent upon how honest and authentic we choose to be. As we move forward with these new skills, we need to remember several things.

First, we can't be too attached to the outcome. We may be honest about a mistake and it could get us fired, but is that the worst that could happen to us? Perhaps it will be the springboard for radical self change. Second, we can't be so focused on the self and meeting our own

needs. We are much better served when we become dedicated to helping others. In moving forward, we will need new ways of relating to each other, new concepts for teams and work and community building. We will have to develop a tolerance for dissonance, for being uncomfortable. This is not to say that we cannot be joyful; we should be joyful all the time regardless of circumstances. However, when we address tough, life-changing issues, we must admit that our natural desire for homeostasis and the status quo will make us feel dissonance, as if we are out of place in our lives. It is this vulnerability which leads to honesty with ourselves, authenticity, and the capacity for change. Otherwise, we keep our guard up and will never change our behavior.

In learning these new skills, they are obviously not just a matter of understanding a new technique such as attention management, using a new KM tool such as learning histories, or shifting our priorities. They involve a radical new way of thinking about the way we live our lives and how our lives play out at work. To build the kind of world we want to build, we must engage in a co-creative process between ourselves as individuals and the universe. And, when we are in the midst of this ebb and flow, letting a new future unfold without attachment, we can look forward to an incredible sense of synchronicity and fit. We will experience what Senge et al (2005) describe as “being in a field knowing itself.”

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