# Chapter 15 Ethical Evaluation of Learning Organizations: A Conceptual Framework

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#### **ABSTRACT**

A key assumption for recognizing knowledge society is the existence of learning organizations. As a result, literature has been fruitful in engaging a wide debate concerning its characteristics, dimensions, evolution, evaluation procedures, or ethical behaviour. Likewise, it is interesting to denote that research appears to pay little regard to the impacts of existing ethical and social dilemmas about knowledge creation, retention/use and sharing within organizational contexts. Therefore, the key purpose of this manuscript is to present a conceptual framework that denotes these dilemmas and their impacts in organizational strategy. For that, this contribution resumes an ongoing research project which intends to approach ethical and social dilemmas in learning organizations. Moreover, it suggests that these dilemmas impact on organizational strategy, as well as that existing evaluation models for learning organizations do not promote the ethical evaluation.

#### INTRODUCTION

Complexity is probably the most significant distinctive feature of our civilization (Pinha e Cunha, Fonseca & Gonçalves, 2001). As technical and economic progresses allow production, transportation and communication to be further efficient, individuals interrelate with a growing number of other individuals, institutions, systems

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and objects. Concurrently, while this network of connections develops and spreads around the world, the miscellaneous systems become reciprocally dependent.

Accordingly, 21st management requirements compel a collaborative approach in order to capitalize dissimilar workers perceptions, instead of the traditional authoritarian, command and control philosophies. People are considered as a "natural" resource and an organizational asset to promote sustainable competitive advantage. Hence, the

novel managing orientation is also embracing innovation as a key element for success and competitiveness (Liyanage & Poon, 2002). This involves expanding the innovative potential of the organization by nurturing new ideas, harnessing people's creativity and keenness, tapping the innovative potential of workers, and encouraging the dissemination of autonomy and entrepreneurship (Black & Porter, 2000).

Nevertheless, new ideas (knowledge) creation, retention/use and sharing in organizations have simultaneously shaped crucial dilemmas for managers given their key role in promoting creativity and innovation inside an organization. Despite Roth & Kleiner (1998) argument that learning organizations have been recognized for decades, the truth is that knowledge society have strengthen several inner ethical and social dilemmas that impact organizational strategy. Thus, this manuscript suggests that these dilemmas, as well their impacts have been neglected as regards to evaluate learning organizations ethical behaviour.

#### **DISCLOSURE INFORMATION**

Following The Free Dictionary (2010), disclosure is the act or process of revealing or uncovering, as well as to make a revelation. Given the overall argument of this chapter, is the author intention to shed some light as regards the concept of an ethical learning organization. For analytical purposes, refers to the recognition of the ethical and social dilemmas that resume knowledge creation, retention/use and sharing within organizational contexts (access to organizational knowledge, autonomy, dignity, privacy, intellectual property, faire compensation and trust). In spite of being a complex reality, because it depends on the moral values of each agent (Moraga, 2006) it is reasonable to claim that managers need to identify and develop idiosyncratic virtues strategically recognized by the society (Gowri, 2007). As a result, to promote an ethical learning organization is necessary that managers recognize these existing dilemmas in order to minimize their organizational impacts.

## LEARNING ORGANIZATIONS: "WHO", "WHAT", "HOW" AND "WHY"!

Literature, at least main stream, is approaching managers' latest responsibilities' within organizations ("who"), "what" is a learning organization or even its dimensions ("how"). However, the "why" has been almost neglected which resumes a paradox, due to the importance of the ethical and social dilemmas that arise throughout the knowledge flow (Costa & Silva, 2007). So, the author argues that the "why" is the missing link!

#### Managers Responsibilities' ("Who")

CEO character is an imperative because these enable organizational values, culture, and performance. The range of outcomes in a virtuous or vicious cycle may be a function of the length of time that an individual is a CEO, which can influence positively or negatively an organization, depending on its character (Gowri, 2007). As a result, the CEO is a key "building block" for setting up an ethical climate. In addition a numerical constraint occurs in this process, since few individuals generate at some extent organizational commitment.

Furthermore, if an organization's unique features are aligned with ethical values will permit to differentiate from other competitors, and thereby produce competitive advantage (Chun, 2005), being a truthfully positive organization (Verbos *et al.*, 2007), as well as transparent one (Costa, Prior & Rogerson, 2008a). Although, to obtain an ethical corporate background is compulsory to verify the subsequent settings (Gilmartin, 2003): managers ought to "embrace the right tone"; formal guidance in ethics and standards of conduct is an organizational imperative; and, the organization should

grant formal instruments, internal and external, in order to permit reporting any misconduct.

#### Concept ("What")

What is the meaning of learning organization? Some writers highlight the learning of all organizational members (Johnson, 2002; Pedler, Burgoyne & Boydell, 1996), whereas others focus on organizational competitiveness (Cavaleri, 2008; Moilanen, 2005; Dealtry, 2002; Slater & Narver, 1995), or even abilities and business purposes (Dusko *et al.*, 2006; Gilley & Maybunich, 2000; Lessem, 1990). At last, a number of authors like Senge (1996) adopt a broader approach, including all the preceding perspectives.

Therefore, since the expression "learning organization" was referred by Senge *et al.* (1994), explanations have prospered in management literature (Sankar, 2003; Loermans, 2002). Yet, literature seems to reveal a lack of accuracy about the concept itself. Ortenbald (2002) denotes that merely a few authors, as for example Argyris (1999), have attempted to produce groups of learning organizations. According to Ortenblad (2002), a learning organization can be recognized throughout four ontological dimensions: cultural values, leaders, communication, and workers.

#### Dimensions ("How")

Researchers and practitioners advocate that permanent learning is crucial to obtain novel skills allowing companies to achieve ever-changing client demands (Barkur, Varambally & Rodrigues, 2007; Addleson, 2000). With constant education and training, assigning resources is vital because the talent to learn is insufficient. An organization must also highlight its ongoing improvement procedure, and engaging a learning culture exhibits a substantial amount of features. Initially, the organization ought to clearly set its lifelong learning practices, from incessant learning and education to fostering and assisting workers learning (Yeo,

2005; Leitch et al., 1996). Secondly, is necessary to maintain a learning environment, which is verified by free will in order to generate stuff and fail, and failure does not entail any organizational sanction (Bratton, 2001; Ahmed, Loh & Zairi, 1999). Thirdly, typically learning organizations do not encompass boundaries, in which members aspire to learn and are compelled to share knowledge (DiBella, 2001; Abernathy, 1999). Finally, permanent innovation is an idiosyncratic element of a learning organization (Cavaleri, 2004; Waldersee, 1997). Leaders embrace key roles given their importance for organizational change (Senge, 1996), however enhance workers' ability to learn. Therefore, leadership commitment and empowerment should be recommended.

Learning organizations managers have the duty to communicate organizational mission and goals to everyone within the company. Moreover, a communication network among organizational members requires being successful and proficient (Ortenblad, 2002; West III & Meyer 1997). because upward or downward communication allows knowledge creation and sharing within an organizational context (Nesan & Holt, 2002). Additionally, communication is the link amid workers' behaviour and organizational performance. In fact, an easy assumption can be illustrated: if more knowledge is communicated, the more it grows (Sunoo, 1999). For this reason, knowledge transfer is a significant characteristic of learning organizations, given that if more interactions involving individuals are encouraged, the higher level of knowledge transfer is achieved (Ortenblad, 2004; Bresman, Birkinshaw & Nobel, 1999); nevertheless knowledge growth is a non linear process due to some ethical and moral dilemmas (Costa & Silva, 2007).

Last but not least, some authors enquire about learning organizations values. For Otala (1995, pp. 163) a learning organization is

like a living organism, consisting of empowered, motivated employees, living in a clearly perceived

symbiosis, sharing the feeling of a common destiny and profit, striving towards jointly defined goals, anxious to use every opportunity to learn from situations, processes and competition in order to adapt harmoniously to the changes in their environment and to improve continuously their own and their company's competitive performance?

It is an ambition frequently viewed cynically by people who do not consider this rhetoric (Garrat, 1999)? Does it suggest to individuals' liberation and empowerment to capitalize their full potential as inventive, intelligent workers (Dymock & McCarthy, 2006; Fenwick, 1995)? Or, it is a tool that can be changed into a "weapon" by managers in a competitive world (Grieves, 2008; Pandey & Gupta, 2008)?

## Ethical and Social Challenges ("Why")

In order to approach the potential ethical and social dilemmas within learning organizations, it is crucial to embrace the unlike insights with reference to the knowledge creation, retention, and sharing. Following O'Neill & Adya (2007), workers have a moral duty not only to be productive (particularly regarding knowledge creation), as well as to share knowledge that benefits organizational body of knowledge. Nonetheless, tacit knowledge should be debarred from manageable knowledge within organizational contexts (KPMG, 2002). This is consistent with KPMG (2002) definition of intellectual property: not just patents, trademarks, copyrights, database rights and other pure intellectual property, or even other types of codified knowledge like business processes, methodologies and know how.

Despite this argument, it is important to clarify the reasons that promote this claim: organizational knowledge versus individual knowledge rights entails a trade-off between privacy, property rights (du Plessis, Britz & Davel (2007), and job security (Costa, Prior & Rogerson, 2008b). Thus, opinions that allege that personal knowledge is effortlessly managed, because it can be "more readily bought and sold" by hiring and firing individuals (Teece, 2000) is a social dilemma that requires an urgent answer. In fact, Ryan (2002) refers that is a personal social right to have right to security and safety.

Companies have a moral accountability to build a knowledge environment where workers can be productive, and engage a chance to generate, share and learn with other organizational members (Costa, Prior & Rogerson, 2008b); although, have the right of reasonably defend their economic moral interests (Blyth, 2005), without violating individual rights like autonomy, dignity, privacy (Baskerville & Dulipovici, 2006). On the other hand, a core query arises: how to sponsor ethical knowledge sharing environments? This paradox replicate two possible trade-offs: holding personal tacit knowledge for individual output versus sharing for organizational output (Trauth, 1999); and, personal effort versus benefit (Ford & Staples, 2005).

Finally, knowledge creators have the right to be fairly compensated for their work (Blyth, 2005), and typically employment contracts do not define in a proper and explicit way intellectual property rights and how these are compensated. Even so, as Davenport & Prusak (1998) recommend is necessary to combine monetary and non-monetary instruments.

In conclusion, Wilson (2002) declares that a truly knowledge environment is a utopian assumption, which at some extent is illustrated by ethics and self-interest act like counter-determinants for knowledge sharing (Wang, 2004). Thus, the ethics of knowledge transfers and conversions become extremely important due to the individual losing sole rights to knowledge (Baskerville & Dulipovici, 2006). Besides, it is intricate to detach divergent motivations versus the kind of social relations (Manski, 2000), since individual conduct is determined by various motives which may vary in similar contexts (Mooradian, Renzl & Matzler

2006). The identification of pre-conditions for successful cooperation engages a major challenge, as well as the role of trust to support knowledge sharing (Cabrera & Cabrera, 2002; Ostrom, 2000).

#### THE CLICHÉ OF EVALUATING

The expression "cliché" aims to resume the stereotype that is possible to measure, manage and evaluate everything. In fact, prior literature focuses on evaluating the subsequent characteristics of learning organizations: economic performance (e.g. Westover, 2006); organizational knowledge project (e.g. Ali & Ahmad, 2006; Collison & Parcell, 2001); auditing organizational knowledge flows (e.g. Bontis, Fearon & Hishon, 2003); organizational and individual learning (e.g. Sun & Scott, 2003; Simons, 1995). Hence, an ethical evaluation has been neglected! Although, is the author belief that is logical to portray the concept "evaluation" and its dimensions in order to promote a substantial argument.

#### **Evaluation: An Overview**

The traditional perception outlooks evaluation as a method that basically commences when capacity-building has happened, and overlooks historical data in order to guarantee that organizational demands about evaluation are being meet (Armitage *et al.*, 2003). The evaluation procedure must capitulate significant information permitting an incessant upgrading process, and for that needs to embrace the following topics:

- what is the organizational strategy and how does it assist in meeting its objectives?;
- what is the position of capacity-building in the overall structure and function of the organizational strategy?;
- how does capacity-building support the organization's strategy and its objectives?;

- what data does the organization need about the effectiveness of its capacity-building programmes?;
- how will this data be applied?

As a final remark, it is feasible to claim that transparency is crucial and the responses to these questions will act as guidance for the measurement procedure. If transparency do not occur, its results will not be relevant for the organization, because evaluation main purpose is to warrant organizational improvement and consequently organizational competitiveness (Armitage *et al.*, 2003).

#### **Economic Performance**

Westover (2006) work enables the following conclusion: none of the features that describe a learning organization affects its economical performance, which is consistent with the theoretical assumption of Kontoghiorghes, Awbre & Feurig (2005). For that, Westover (2006) firstly applied the learning organization assessment matrix of Kline & Saunders (1993) to determine if the organizations were learning organizations. Afterwards these results were gathered in ten primary categories, and finally constructed a table to exhibit the information about sector, size, ownership, share value or net profit and the average scores for each category. Finally, each individual score was graphed against share value and net profit in order to recognize the influence or not of each characteristic.

#### Organizational Knowledge Project

The Ali & Ahmad (2006) framework advocates that environmental forces and organizational resources are geographically disseminated; and an active response to the environmental forces imply a knowledge management project. Throughout a mix of human resources, ICT, information and energy is facilitated goods and services production.

For that reason, the authors acknowledge three major components with reference to knowledge progress: creation, retention, and sharing. Furthermore, management literature pleads that decision making involves uncertainty and incomplete information, reinforcing the need for novel approaches. Time pressure demands that companies exploit historical data; hitherto, this approach indulges serious limitations as demonstrated by the current economic crisis. Therefore, it is important to embrace a refined level of know-how, know-what, know-who, know-where and know-why.

The knowledge management model has created about 700 virtual communities around the world including in public and private domains (Collison & Parcell, 2001). Collison & Parcell (2001) refer that during its implementation a myriad of processes require managers' attention: integration process, cultural barriers, and best practices. In fact, acquisitions and mergers are keen examples of cultural conflicts within organizational contexts which require a pro-active attitude by managers. Likewise best practices resume a critical praxis for managers in diverse organizational scenarios, because it promotes a culture of improvement and continuous learning without ignoring business ethics practices.

#### **Organizational Knowledge Flows**

Bontis, Fearon & Hishon (2003) in their work *The e-flow audit: An evaluation of knowledge flow within and outside a high-tech firm*, have evaluated through an auditing process the knowledge flow through e-mail. For that, the authors considered:

- 1. the e-mail flow inside and outside the company;
- 2. the flow map through a combined organizational chart;
- 3. how workers utilize the e-mail;
- 4. e-mail correspondents and senders;
- 5. which factors affect its usage.

The methodology is quite simple: an amount of internal and external e-mails is chosen and the following step is to categorize them by senders (individuals and departments), as well as the correspondents (individuals and departments). Additionally, the subject was analysed in order to understand if acknowledges the expected flow within the organizational context. Afterwards, a questionnaire provides information regarding the factors that affect its usage, as well as the motives about the correspondents' choice.

## Individual and Organizational Learning

The theoretical model of Sun & Scott (2003) resumes an attempt to link individual and organizational learning. Despite individuals perform as prime learning agents (Huber, 1991; Argyris & Schön, 1978); their learning process is far from independent. In fact, Brodbeck & Greitemeyer (2000) demonstrate that when individuals act as a communal agent have a more steady and productive form of learning. Nonetheless, the nature of learning is related to the existing barriers, anxieties, and results in either single or double-loop learning, which acknowledges the quandary of learning transfer throughout the organization. In addition, the transfer itself hinders some disabling factors that require to be minimized. Sun & Scott (2003) still argue that single and loop-learning is the sphere of influence of learning theorists, while learning transfer is the field of learning organization practitioners. So, the extent of learning transfer, across its dissimilar stages, determines the gap amid both streams. This clearly highlights that learning barriers constantly enhance the gap as regards to descriptive and prescriptive organizational learning.

Simons (1995) examines the existing levels of learning: individual ability; groups' ability; and, organizational ability. All these levels configure objectives, actions, measuring, and feedback/rewards. Objectives configuration entails the

common influence of the external and internal environment, leading to an analysis of their sources: environment; individuals; groups; and management. What literature refers is that idealistic all these sources should engage a similar way, as well as individual objectives will be a component of group and organization learning throughout a mix of autonomy and freedom. Moreover, individual influence over group and organizational objectives reveals a blend among strict and broad boundaries, which allows maximizing autonomy within these limits.

#### RESEARCH PROTOCOL

Traditionally the main purpose is to portray a clear and a complete description concerning aims, objectives, methodological assumptions and data collection methods. In spite of this statement, the author will simply shed some light upon the aims and methodological assumptions. The motives are simple: data collection methods will be explained in section empirical procedures due to their importance, as well as to promote a more indulgent argument; in addition, it is vital to integrate the research project methodological assumptions and empirical procedures with analogous studies in order to consent a plausible and effective explanation.

#### Aims

The ongoing research project aims to debate the ethical and social dilemmas in learning organizations, as well as their overall impact in organizational strategy. For that, the analysis embraces three distinctive dimensions: knowledge management, organizational culture and ethics.

#### Methodology

#### Assumptions

Miles & Huberman (1994) refer that descriptive research aims to make complex issues logical by reducing them to their elements; or, when the researcher is not totally aware of the circumstances, despite acknowledging the research problem (Zikmund & Zikmund, 2000). On the other hand, explanatory research aims to illustrate certain phenomena from unlike perceptions (Yin, 1994), which resumes the research problem.

In order to permit subjective and inquiring results a mix of interpretative and critical theory is consistent with look for meaning in context. Therefore, Klein & Myers (1999) argue that to recognize how a reality emerged is vital to analyse the social and historical context, despite the output be discussable (Sandberg, 2005). Likewise, the observation of social reality is an imperative of critical research as documented in several narratives of critical research (Hirschheim & Klein, 1994).

Moving forward, a blend of a case study approach and grounded theory will generate reasonable outcomes. Hence, the author considers that an embedded multiple-case study (Yin, 1994), as well as Myers (1997) procedures as regards to case study method will assure a positive answer to the underlying research option. Plus, grounded theory enables a theoretical framework through data rather prior studies, as well as permits modify data collection through continuous penetrating questions (Glaser & Strauss, 1967).

#### **Design Justification**

As a consequence of being a recent discipline knowledge management studies do not engage a conceptual consensus, and this scenario is even enhanced due to an insignificant number of empirical research about its ethical dilemmas. Thus, the limitations of a positivist approach and

the researcher's pre-understanding allow recognizing the validity of an interpretative approach (e.g. Senges, 2007), leading to a descriptive and explanatory analysis for organizational knowledge processes.

Regardless the existence of other theoretical contributions (e.g. Seppanen, 2008; Bajracharya & Masdeu, 2006), a novel one is required to promote an effective and realistic response to the underlying assumptions. So, to interpret managers' and workers' behaviours and decision making is essential through subjectivity and inquiring results (e.g. Senges, 2007). Additionally, two case studies and one pilot study will let a feasible comparison of organizational environments (e.g. Greig, 2008), and the emerging theory will disclose the complexity of human interactions throughout a permanent feedback process pertaining to the empirical results (e.g. Douglas, 2006; Fuchs & Hanning, 2001).

#### **EMPIRICAL PROCEDURES**

Data collection methods acknowledge five semistructured interviews to organizational key managers, and web questionnaires comprising multiple choice and ask for agreement queries for workers. Semi-structured interviews promote a way to obtain the informants beliefs and opinions through a verbal exchange (Burns, 2000), and according to Macionis & Plummer (1998) these questionnaires are typically filled in by the respondents. Although, due to interviews or questionnaires multiple perils and the sensitive nature of the research project is advisable to conduct pre-tests and pilot studies (Yin, 1994).

Besides, for justifying data collection methods the author refers as examples the work of Squier (2003) and Kull (2002), who have reported semistructured interviews as a way to be aware of managers' insights about organizational culture, and their decision-making process. This argument is still reinforced with Hariparsard (2005)

multiple choice questionnaires for observing workers' awareness concerning organizational culture. As a final remark, analogous cases can be pointed for fine-tune the interview protocol or questionnaires in order to recognize managers' and workers' behaviours and values (Waldstrøm, 2003; Kull, 2002).

#### **Pre-Tests Diagnosis**

Pre-tests (simply questionnaires) have occurred throughout February 2009, and acknowledged various sampling constraints:

- sample size- 50 individuals from dissimilar professional and educational environments. Plus, to promote a high level of reliability it was determined the following weights for each focus group (top management: 30%; middle management: 30%; operational management: 40%);
- professional background- at least five years of professional experience, and working in learning organizations were also considered.

In order to proceed with the pre-tests some design procedures were required:

- sections- the questionnaires were divided in three sections (participant profiling, knowledge management and organizational culture). Participant profiling aimed to highlight respondents' characteristics, and the remaining sections to identify the ethical and social dilemmas because ethics is an unifying and transversal element;
- feedback process- a box for comments and suggestions was introduced for each query in order to obtain feedback about the question content, generated feelings (comfort-

able or uncomfortable), and if respondents answers were honest and sincere.

So, the next step is to report the existing questions, its category, as well as its aim of analysis (Table 1):

In order to understand the systematic procedures about pre-tests conclusions, it is vital to illustrate three milestones:

- comments and suggestions content analysis- reported respondents remarks, as well as the grounded theory procedures that allowed to gather and categorize them;
- answers content analysis- underlined a qualitative scrutiny for all questions, despite each query category had a dissimilar combination of methods. Multiple choice queries were revised using a numerical analysis to all results, as well as for each group analysis (top managers, middle managers and workers); on the other hand, the ask for agreement questions were authenticated through a blend of grounded theory and hermeneutics;
- framework versus results- described the interaction involving pre-tests results and the theoretical framework.

After the pre-tests results analysis, four leading conclusions were asserted:

- sampling constraints- sampling size and professional background were both achieved, in spite of a minor detail (two respondents had less than two years of professional experience). This was considered irrelevant due to sample features as well as pre-tests do not act as modus operandi for a research protocol;
- commentaries and suggestions content analysis- the queries revealed a high level of consistency, which was demonstrated by insignificant amendments in questions

- 2, 5 (instigated two dissimilar questions), 6, 8, 10 and 15 (observe Table 2);
- answers content analysis- the results indicated that the ethical and social challenges referred are factual, and managers tend to recurrently ignored them (Costa, Prior & Rogerson, 2010a);
- framework versus outcomes- justified the need for a novel approach, as well as the outlined framework (observe section "a proposal") engaged an encouraging reply.

#### Pilot Studies Diagnosis

After accomplishing the pre-tests, during June 2009 a series of pilot studies (questionnaires and interviews) were conducted within a learning organization in Portugal; nevertheless, at this point is decisive to emphasize the systematic procedures of both data collection methods.

In order to guarantee a feasible and consistent research, the author has produced similar sampling constraints for the questionnaires:

- sample size- 25 per cent of the population within the learning organization, representing each focus group the following weights: top management (30%), middle management (30%), and workers (40%);
- professional background- at least five years of professional practice within the pilot study organization.

Nonetheless, an important detail concerning pilot questionnaires design was the absence of a box for comments and suggestions in order to emphasize the results of pre-tests, and to confirm the queries reliability. Beyond these assumptions, the author acknowledged two interviews outside the learning organization prior to dialogue with the learning organization Human Resources Manager (HRM). Once again, these procedures validate the research protocol namely through recognizing

Table 1. Pre-tests questionnaire

Nr.	Question	Category	Aim of analysis
1	Organizational position: top manager, middle manager or worker?	MC	To understand which organizational perception is being covered
2	What you value most? (order from 1 to 3 your options)	MC	To perceive individual behaviour of managers and workers
3	How you mainly define your organizational role?	MC	To recognize the level of influence of managers and workers inside organizational culture
4	Do you consider that workers may express themselves and have free access concerning the organizational body of knowledge?	MC	To identify possible ethical dilemmas concerning organizational knowledge processes
5	Do you consider that worker's autonomy, dignity and privacy are recognized into the organizational body of knowledge?	MC	To identify ethical dilemmas concerning personal knowledge management
6	Do you consider that your personal experience is organizational intellectual property?	MC	To understand ethical dilemmas concerning personal knowledge management
7	Do you consider that knowledge creation, management and sharing into the organizational environment are fairly rewarded?	MC	A not faire compensation may undermine cooperation, therefore knowledge sharing can be seriously affected
8	Do you consider that workers who do not proceed to knowledge creation, management and sharing are fairly sanctioned?	MC	To perceive the relationship between behaviour and knowledge sharing
9	State what is meant to be a fair compensation or a fair sanction regarding knowledge creation, management and sharing in an organizational environment?	AfA	Allows the perception of possible contradictory answers regarding the two previous questions
10	In your opinion, does the organizational code of ethics or conduct clearly demonstrate the possible dilemmas con- cerning the process of knowledge creation, management and sharing, particularly at an individual level?	AfA	Allows a personal perception concerning existing organizational codes
11	Do you consider that employees feel that exists a culture of trust in the organizational environment?	MC	To comprehend the level of confidence concerning organizational culture is a key issue
12	Do you consider that a culture of trust is vital to allow knowledge creation, management and sharing into the organizational environment?	MC	Given the learning organization dimensions it is vital to realize this relationship
13	Do you consider that top management and workers feel confident in their mutually organizational relationship?	MC	To be aware of possible tensions concerning managers and workers
14	Do you consider that organizational values represent a culture of trust in the organizational environment?	MC	To grasp how organizational codes generate trust
15	In your opinion, in which ways can a culture of trust be promoted in the organizational environment? And, how could you individually generate trust in the organizational environment?	AfA	To understand how each focus group values trust
16	Refer if you consider that ethical decisions may change according to the role and the context of knowledge creation, management and sharing. And, in which way such decisions affect organizational trust?	AfA	A key question to understand individual decision making, as well as ethical intensity
17	In your opinion, does the organizational code of ethics or conduct allow a transparent relationship regarding all the stakeholders?	AfA	To realize how the framework responds
18	Practical examples (for managers only)	MC and AfA	Two practical examples in order to allow managers present and justify their personal beliefs

MC: multiple choice queries;

AfA: ask for agreement queries.

*Table 2. Pre-tests revised queries* 

Nr	Question	Category	Aim of analysis
2	What you value most? (order from 1 to 3 your options, being 1 the most important. In case of evaluating the criteria in the same way choose that option)	МС	To perceive individual behaviour of managers and workers
5	Do you consider that worker's autonomy, dignity are recognized into the organizational body of knowledge?	MC	To identify ethical dilemmas concerning personal knowledge management
6	Do you consider that worker's privacy is recognized into the organizational body of knowledge?	MC	To identify ethical dilemmas concerning personal knowledge management
7	Do you consider that your personal experience lived within the organization is organizational intellectual property?	MC	To understand ethical dilemmas concerning personal knowledge management
9	Do you consider that workers who do not proceed to knowledge creation, management and sharing are sanctioned?	MC	To perceive the relationship between behaviour and knowledge sharing
11	In your opinion, does the organizational code of ethics or conduct (written or tacit) clearly demonstrate the possible dilemmas concerning the process of knowledge creation, management and sharing, particularly at an individual level?	AfA	Allows a personal perception concerning existing organizational codes
16	In your opinion, in which ways can a culture of trust be promoted in the organizational environment? What measures you individually take to generate trust in the organizational environment?	AfA	To understand how each focus group values trust

potential differences among interviews in learning and non-learning organizations.

As a result, the underlying analytical procedures resumed the following remarks:

- answers content analysis- a qualitative enquire was performed, in spite of multiple choice embrace a generic and group numerical analysis and a mix of grounded theory with hermeneutics for ask for agreement queries;
- framework versus results- similar results were reported.

Given the overall arguments, it is mandatory to report the pilot studies results:

 sampling conditions- sample size and constraints intentions were reached, since the learning organization population was roughly 100 employees, being produced 28 questionnaires from which 25 were considered valid;

- answers content analysis- revealed queries reliability and corroborated the existence of ethical and social dilemmas, as well as an analogous awareness as regards to managers' (Costa, Prior & Rogerson, 2010b);
- framework versus results- similar conclusions were obtained.

#### "LIGHT REFRACTION"

### "Light Refraction": An Understatement

According to the Wikipedia (2010a) "refraction is the change in direction of a wave due to a change in its speed", so dissimilar optical materials resume different refraction angles and levels of dispersion (refraction index). Likewise is reasonable to suggest multiple refraction (multidisciplinary analysis), as well the refraction index (each research discipline contribution) to describe the conceptual proposal.

#### **Conceptual Tools**

The theoretical contribution exploits instruments of four research fields: business strategy, maintenance management, e-learning, and ethics. It might appear complex and reckless to merge these four disciplines; nonetheless, the intricacy of an ethical evaluation justifies a multidisciplinary approach.

#### **Business Strategy**

According to Thompson & Strickland (2003), organizational strategy is a management game plan to reinforce the organization's competitive position, please customers, and achieve performance goals because through flexibility and adaptability. The conceptual tool that this discipline provides is the SWOT analysis, which aims to audit the organizational internal and external environment to determine its competitiveness and survival chances. Following Freire (2008) strengths and weaknesses are internal factors, and opportunities and threats are external factors. Given the nature of this manuscript the ethical and social dilemmas mainly influence organizational strengths and weaknesses.

#### Maintenance Management

Maintenance management acknowledges the industrial function or other that unites management, technical and economic activities, in order to optimize any organizational good life cycle (Campbell & Jardine, 2001), with the intention to achieve high levels of availability. In this case, under debate will be the Permanent Internal Auditing Process (PIAP), which is a diagnosis process supported by a sequence of questionnaires, with three analytical stages: data collection; information analysis; and to set up an improvement action plan when a quandary is recognized (Marimba & Farinha, 2003).

Each question introduces four possible answers pertaining to the organizational context: "always"

(if always occur); "not always" (sometimes is not verified); "hardly ever" (occasionally takes place); and "never" (never happens within the organization). As a result, the questionnaire entails two components: answers about the performed enquiries; and, assess the obtained outcomes. In addition, to every potential reply is specified a scale of importance, representing three colours: green, yellow, and red. These retorts act as elimination criteria: green is the suitable answer (desirable answer); yellow implies an extraordinary reply (its existence must be squat, entailing an urgent upgrading); and finally, red designates a critical answer (under no circumstances should occur within the organization).

As a final remark, the author denotes that throughout PIAP will be possible to continuously monitor, diagnosis and improve action plans to minimize the ethical and social dilemmas that arise in knowledge creation, retention/use and sharing.

#### E-Learning (Here)

E-learning can be considered as the use of new multimedia technologies and the web, to develop learning throughout access to resources and services, as well as remote exchanges and cooperation (Commission of the European Communities, 2001). Or, basically is nothing more than the exploitation of electronic tools and technologies to support lecturing and learning. In addition, when compared to organizational knowledge management e-learning entails analogous ethical and social dilemmas, as for instance: intellectual property, privacy, autonomy, among others. Therefore, to explore the e-teaching model of Stahl (2002) is reasonable.

Stahl's (2002) theoretical matrix connects three analytical levels: ethical impact awareness, subject involved, and whether it is a hypothetical or practical problem. The insights concerning ethical impact exhibit the distinction between descriptive, normative and meta-theory philosophy. The next dimension represents the evolution

of acting in a moral sense, because traditionally ethical theories symbolize an individual feature. Despite this argument, contemporary society has been replacing individual by collective agents (meso-level). This level causes numerous issues since the agent status is blurry; even so, its decisions encompass moral rights and duties. Apart from the previous levels state or society is also a moral subject (macro-level), given its influence over ethical issues. Moreover, the author believes that is not required to detail the divergences amid theoretical and practical ethical problems.

In conclusion, this contribution will allow to recognize the awareness, subject involved, and if the ethical issue is theoretical or practical.

#### **Ethics**

As a field of academic inquiry, ethics aims to differentiate among good or evil in more or less abstract terms, despite the lack of consensus regarding the concept itself (Pojman, 1994). However, since the mid 1990s a rising number of scholars and practitioners from diverse research fields considered as vital the introduction of ethics into their disciplines. Thus, this manuscript will focus two business ethics instruments: codes of ethics and codes of conduct, regardless Kaptein & Schwartz (2008) critics. These authors acknowledge the concept of "business codes" as a sum up of both codes, although codes of conduct act as an instrumental component of an organizational code of ethics. This argument resumes the non-unitary perspective of ethics, in which ethics embraces the "common good" and moral regulates our actions (Stahl, 2002).

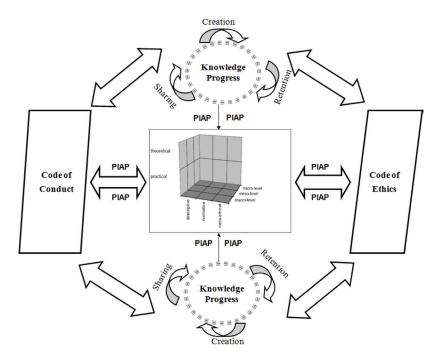
It is broadly recognized that codes of conduct or behaviour attempt to predict and avoid certain particular behavioural patterns like conflicts of interest, self-dealing, bribery, and inappropriate actions. To Schneider & Baroux (2002), these refer principles and rules of conduct about individual's responsibility within organizational environments. These authors still argue that in spite their changes

overtime (biological comparison), occasionally is valuable to reflect upon historical standards in order to identify related behavioural issues, bearing in mind the impacts of technological and social constraints. For that, the author does not agree that is possible to locate codes of conduct amid codes of ethics and of practice as Donald Gotterbarn (2000) refers, because codes of ethics are also used to express individual and collective purposes.

Examples of collective purposes are easily demonstrated throughout history, as well as their antagonism with reference to law (Bynum & Rogerson, 2003). Ethical codes rarely provide meticulous or precise prohibitions; instead, they refer a broader set of attitudes which endeavours to inform individuals pertaining to their behaviours (Gilman, 2005). Or, according to Pater & Van Gils (2003) ethical codes can be described as written, official and formal manuscripts which act as guide for employees and corporate behaviour. Nevertheless, in order to produce a fruitful debate surrounding codes of ethics is necessary to comprehend their efficiency. For authors like Seib & Fitzpatrick (2006), McNamara (2005), and Bivins (1993) an effective code of ethics must demonstrate to stakeholders that violators will be punished. Simultaneously, it must promote cooperation by working with offenders as a replacement for instant punishing (Ayers & Braithwaite, 1992).

Despite the impeccable logic of these theoretical contributions, Fairweather (2003) expresses a complex quandary: what constitutes an incomplete ethical code? And what constitutes a complete ethical code? The answer to the first question is acknowledged above. The second question leads to a further query: does the author of any ethical code or any other writing moral obligation foresee (mis)interpretations of this code? Hence, the option is to cover as many circumstances and issues as possible or not? The truth is simple: it is impossible for an author to determine the "completion" of a code of ethics or to foresee all

Figure 1. Theoretical framework, part



probable behaviours. In spite of this claim, through the analysis of the organizational codes of ethics and conduct it will be possible to recognize the ethical practices and values, as well as how these influence managers perception regarding the ethical and social quandaries.

#### A Proposal

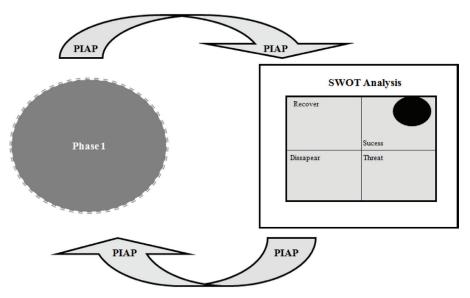
As previously explained PIAP is a diagnosis method based on a sequence of enquiries, with three analytical stages: data collection; information analysis; and to elaborate an improvement action plan every time a dilemma is acknowledged. Accordingly, PIAP will continuously interact (feedback process) with the organizational code of ethics, organizational code of conduct, and also with the organizational knowledge management project. Besides, the questionnaire outcomes (by colours) will be reflected in Stahl's (2002) matrix, indicating an "intermediate status" on the topic

of organizational ethical and moral behaviours, as Figure 1 exhibits.

The idea of "intermediate status" intends to express an incomplete analysis (stage 1), since organizational survival depends on how the market (society) comprehends these internal and external behaviours, leading to the "final status" (stage 2, which Figure 2 illustrates). For that reason, the SWOT analysis will evaluate the organization's ethical positioning despite potential critics (e.g. Deephouse & Carter, 2005). Nevertheless, in order to produce a reliable argument is vital to detail the interaction among the PIAP, Stahl's (2002) matrix and the SWOT analysis (Tables 3 and 4).

Table 3 displays the virtual weighting of every impact within the SWOT analysis, considering the probable scenarios of Stahl's (2002) matrix. The lowest value is 0% and the highest value is 100%, which for some readers may contradict the research design criteria (a qualitative analysis). Although, the author argues that such criticism is

Figure 2. Theoretical framework, part 2



groundless due to the importance of the following reminders:

- SWOT analysis- the SWOT itself considers unlike impacts for each criteria within the different layers: strengths, weaknesses, opportunities and threats. These impacts reflect a combination of a relative and absolute scales, and are a pre-condition of constructing a SWOT analysis. Even so, the "value" given by individuals depends on their personal experiences, judgment and sensitivity;
- PIAP analysis- a pre-condition for constructing the PIAP framework is that the probable responses to the enquiries ("always", "not always", "hardly ever", and "never"), are transformed into a colour scale according to their historical data: "always" and "not always" (green); "hardly ever" (yellow); and "never" (red);
- descriptive research- resumes the author "blurry" perception about the organizational impacts for both analysis. This is consistent with the fact of the researcher is not entirely conscious of the situation (descriptive research).

Table 3. PIAP, Stahl's (2002) matrix, and the SWOT analysis interface (act 1)

		Subject Involved				
		Micro	Meso	Macro		
	Meta-theory	5	10	15	Theory	Category
		20	25	30	Practice	
Ethical Impact	Normative	70	75	65	Theory	
Ethical Impact		85	90	80	Practice	
	Descriptive	45	40	35	Theory	
		60	55	50	Practice	

		Subject Involved				
		Micro	Meso	Macro		
	Meta-theory	Green	Green	Green	Theory	
		Green	Green	Green	Practice	Category
E41:1 I4	Normative	Yellow	Yellow	Yellow	Theory	
Ethical Impact		Red	Red	Red	Practice	
	Descriptive	Yellow	Yellow	Yellow	Theory	
		Red	Red	Red	Practice	

Table 4. PIAP, Stahl's (2002) matrix, and the SWOT analysis interface (act 2)

Likewise, to avoid further negative comments the author introduces a novel table as regards to the organizational impact, by converting the numerical values into colour scales due to PIAP (read after Table 4 the empirical argument). Furthermore, in section rigor and liability the author will proclaim and validate these procedures through research methods literature.

The conversion procedure reflects the absence of historical data, because the empirical results analysis undeniably reveal that top managers have been ignoring the reported ethical and social dilemmas (for further details see Costa, Prior & Rogerson, 2010a; Costa, Prior & Rogerson, 2010b). As a consequence, the following combinations arise:

- meta-theory/micro-level/theoreticalgreen, since it discusses theoretical issues an individual level, so no impact is verified;
- meta-theory/meso-level/theoretical- green, due to similar reasons in spite of being at a meso-level;
- meta-theory/macro-level/theoreticalgreen, because societal theoretical debates have no impact into the organization;
- meta-theory/micro-level/practical- green, in spite of analyzing practical issues because it is simply a theoretical subject;
- meta-theory/meso-level/practical- green,
   by analogy although at a meso-level;

- meta-theory/macro-level/practical- green, since macro issues have a inexistent impact within organizational context;
- normative/micro-level/theoretical- yellow, because normative ethics attempts to substantiate individual moral issues, as well as theoretical scenarios have a lower impact;
- normative/meso-level/theoretical- yellow, by equivalence in spite of a dissimilar ethical actor;
- normative/macro-level/theoretical- yellow, for the reason that societal moral issues have some impact into organizational strategies;
- normative/micro-level/practical- red, because it becomes a practical issue meaning higher impact;
- normative/meso-level/practical- red, due to analogous reasons although at a divergent level;
- normative/macro-level/practical- red, assuming the impact into organizational strategies;
- descriptive/micro-level/theoretical- yellow, regardless theoretical dilemmas promote lower impacts within organizational contexts. Moreover, descriptive ethics engages ethical practices and that is what justifies this colour;
- descriptive/meso-level/theoretical- yellow, due to comparable state of affairs although concerning meso-level;

- descriptive/macro-level/theoretical- yellow, because societal ethical and social practices have a gigantic impact in business strategy;
- descriptive/micro-level/practical- red, for assuming practical issues and individual's ethical behaviour;
- descriptive/meso-level/practical- red, in order to be consistent with the previous arguments concerning the relationship between micro and meso-level;
- descriptive/macro-level/practical- red, as a consequence regarding organizational strategy.

Is the author belief that these answers may be changed as a consequence of organizational dynamics (historical data interpretation), as for instance the next example highlights: if top management is having a conjectural debate pertaining to intellectual property rights throughout the use of its social network, the colour will be green (first interaction); however, if the dilemma becomes practical within the organizational context the colour is yellow (a non-regular issue that requires an intervention) (historical data because resumes a second interaction), or will become red if its level of frequency enhances tremendously (future interactions). Finally, this novel insight with reference to ethical and social dilemmas impacts promise to capture the richness of results that empirical data will produce.

## "Shedding Extra Light": A Practical Example

This subsection aims to highlight two practical cases (similar to the existing ones in pre-tests and pilot studies), in order to display how the framework interacts. A critical assumption will be considered: the organizational code of conduct consents workers to explore the IT resources apart from their standard tasks: is legitimate to have private folders, receive personal e-mails, and utilise the social network for social or collaborative reasons. Despite these privileges, the code informs that is an organizational right to monitor employee's productivity throughout remote control systems.

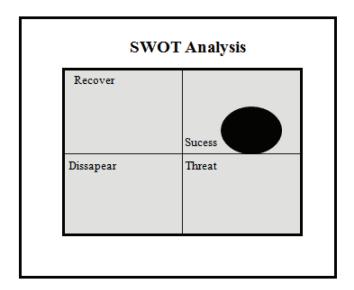
The initial example is theoretical: managers are trying to classify potential content violation with reference to workers' personal folders or e-mails. This quandary is theoretical because it has no historical background within the organization, and a non-replication constraint is included. The second example can be labelled as practical: managers obtain an idea for an innovative product through the monitoring process of the social network, namely using a conversation amid two workers. The idea was non-work related, and non-related to the organizational core business or future strategies. In spite of these characteristics, this product became a worldwide market leader.

So, in order to achieve a clear and productive explanation concerning how the framework will interact the author introduces Table 5.

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Table	٠.	Practical	ovamnlos	analysis
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Case	Ethical and social dilemmas	Stage 1 (PIAP)	Stage 2 (Stahl's matrix)	
1	Privacy	Answer: "never" due to the absence of similar past events	Answer: meta-ethics; meso-level; and, theoretical. Colour: green, in spite of being an attempt to categorize a possible event	
2	Faire Compensation	Answer: "never" due to the absence of similar past events	Answer: normative; micro-level; and, practical. Colour: yellow, because it requires a intervention, because it is a practical situation	

Figure 3. Example 1



If the reader bears in mind the relative weights typified in table 4, the outcome for each example into the SWOT analysis will be similar to Figure 3 and Figure 4.

#### **Rigor and Liability**

Rigor and liability are key features of any empirical research, so the author has decided to shed some light regarding the following issues: methodological design, empirical procedures, and philosophical argument.

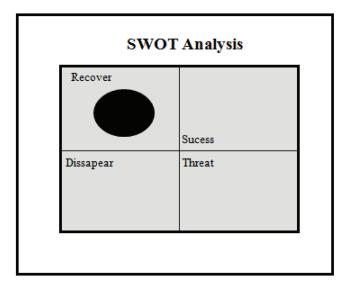
Numerous researchers plead the concept of methodological pluralism or "triangulation" (e.g. Cox & Hassard, 2005; Weber, 2004), as an opposite perspective to multi-site research (Audet & d'Amboise, 2001). According to Creswell & Clark (2007) mixed methods promote: triangulation (corroborate data and obtain convergent validity); complementarity (total explanation about the results); development (guide further data collection, sampling, or analysis). Even so, Ammenwerth, Ilber & Mansmann (2003) argue that different categories of data obtained through unlike sources cannot validate each other, which the empirical outcomes seem to contradict. This last claim is

consistent with the philosophical, cultural and even psychological concern that Alaranta (2006) reports with reference to triangulation, because in spite of facilitating the phenomenon analysis engages multiple practical problems.

On the other hand, the empirical procedures promote two analytical dimensions: pre-tests and pilot studies design, and results analysis. The questionnaires "design" (sections and queries characteristics) intended to understand individual ethical behaviour and its impact within a system, which is similar to qualitative and numerical approach of Šuc, Vladušič & Bratko (2004). Regarding results analysis it is possible to acknowledge:

answers reliability- the author has drawn a table that compares respondent's data profiling (organizational position, what you value most and organizational role) with their answers (multiple choice and ask for agreement) of each section, as well as this procedure was acknowledged with both sections to detect probable conflicting opinions and beliefs (interpretative flexibility) (Doherty, Coombs & Loan-Clarke, 2006);

Figure 4. Example 2



- answers content analysis- multiple choice questions were analysed through a numerical analysis, which is defensible through Creswell (2003) argument: if a researcher asserts to acknowledge in-depth insight into an event, it might choose a diminutive however informative example, or might also exploit a simple inferential numerical analysis to detail the results. Nevertheless, the concept "numerical analysis" will surely induce criticism because in Anglo-Saxon culture numerical implies a quantitative research, which is consistent with the argument of Alaranta (2006). In addition, ask for agreement questions were analysed through a mix of grounded theory and hermeneutics which is consistent with Strauss & Corbin (1998, pp. 178) claim that "grounded theory will include its combination with other methodologies including phenomenology and hermeneutics", as well as that can interact as the missing link in interpretative research (Goulding, 1998). This argument is enhanced because interpretative research limits are visibly
- diminished when methodological isolation does not occur (Williams, 2000);
- framework versus results- the pre-conditions to construct a PIAP and SWOT analysis, as well as the conversion process sums up the author judgment and sensitivity as regards to managers perception of the ethical and social dilemmas throughout the questionnaires and interviews (including the practical examples). Descriptive research features will help to cope with probable critics, and once again the visible limitations of interpretative research are diminished due to grounded theory "cycles", which is consistent with Williams (2000).

Finally, the philosophical argument refers to abduction (identical to inferation of a cause in order to explain a consequence), which acknowledges numerous explanations along with some erroneous outcomes (Zait & Zait, 2009). Peirce (1878) argues that is a method of experimentational mental reflection hospitable to forming hypotheses and conducive to testing them, whereas the abductive argument reaches beyond the limits of critical evidences (Calvert-Minor, 2009).

#### **FUTURE RESEARCH DIRECTIONS**

Bearing in mind light refraction, the author proposes to extend the metaphor to lighthouses lens to debate potential future research directions. Following the Wikipedia (2010b):

A lighthouse is a tower, building, or other type of structure designed to emit light from a system of lamps and lenses or, in older times, from a fire, and used as an aid to navigation for pilots at sea or on inland waterways.

Furthermore, their light refraction depends on several factors, like the power of the optical device, observer geographical position, etc. and its range is expressed in three levels (Instituto Hidrográfico, 2003):

- geographical- distance that the light can be seen from the lighthouse;
- light- maximum distance that light is observable;
- nominal- imposes to calculate its height (distance among the base and light) and altitude (difference amid the mean sea level and light focal plane).

Through a metaphorical explanation, it is reasonable to consider that geographical range (enables the ethical evaluation framework proposal), light range (potential organizations under scrutiny), nominal range (framework critical assessment). Yet, two important queries arise: what is the significance of potential organizations? And, what is a critical assessment?

The initial purpose of the conceptual framework is to evaluate learning organizations as regards to ethical avoidance, although some authors like Rowley & Gibbs (2008) argue that learning organizations will become wisdom organizations. The concept is related to the confrontation between neo-liberal tendencies and internal and external moral practices, so:

wise organization must create time for the virtues that allow wise, practical judgements to be made. An organization has a temporality where it remembers the past, accepts responsibility for it and uses that to devise a new space for itself in the future whilst acting now (Rowley & Gibbs, 2008, p. 364).

Hence, to grasp the veracity of this scenario the author claims that wisdom organizations fall under the "conceptual umbrella", despite the importance to initially assess the framework through worldwide applications in learning organizations given the specificity of organizational contexts. This process will generate an adequate amount of historical data (empirical results), allowing to determine if changes are required or not, in order to increase the level of reliability.

#### CONCLUSION

In spite of being an ongoing research project, the author will pinpoint some additional interesting conclusions through two macro arguments: research protocol analysis, and author future insights. Yet, research protocol analysis will be divided into the following issues: research protocol overall structure; data collection analysis; framework response; rigor and liability; author future insight.

First, the research design structure (including data collection methods) appears to respond positively to existing ethical and social dilemmas within learning organizations. Secondly, the empirical results confirm the existence of these dilemmas, being reasonable to argue that learning organizations are not ethical because managers neglect these dilemmas with reference to knowledge creation, retention/use, and sharing. This attitude is at some extent explained by the novelty of these dilemmas; nonetheless, is the author conviction that resumes managers' lack of moral reasoning and sensitivity. The second

conjecture requires further focused empirical research despite numerous approaches to managers' moral sensitivity (e.g. Pedersen, 2009; Treviño & Weaver, 2003; Wittmer, 2000). On the other hand, it is important to emphasize that the conceptual framework also enables a positive response, allowing categorizing these dilemmas and analysing their impact in organizational strategy. Therefore, it is reasonable to argue that rigor and liability resume this ongoing research.

Regarding the second macro reason is the author conviction that future case studies will entail similar empirical results, which demonstrates the need for an ethical evaluation (permanent procedure that helps managers to recognize the outcomes of applying new strategies concerning moral and behavioural values in organizations). Therefore, wisdom organizations will require an analogous analysis despite Rowley's (2006) argument that these will act ethically in order to collective good be achievable.

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#### **KEY TERMS AND DEFINITIONS**

**Ethical Dilemmas:** a situation that frequently engages an apparent conflict among moral imperatives. It is also considered an ethical paradox in which ethical decision enables conflicts.

Ethical Learning Organizations: organizations that recognize the existing ethical and social dilemmas as regards to knowledge creation, retention/use, and sharing within their contexts, as well as their impacts in organizational strategy.

**Evaluation:** method that aims to gather organizational historical data in order to give updated information feedback as regards to capacity-building versus strategy, objectives and effectiveness.

Learning Organizations: organizations that recognize that knowledge will only flourish if: individual and collective learning occurs, an innovative environment exists, boundaries are not well defined, and how communication is essential among all members.

**Social Dilemmas:** circumstances in which individuals reasoning leads to collective irrationality. Resumes interpersonal conflicts versus group reasoning.