**Title: The happy families of social learning / convening a social learning orchestra**  
  
(*Process observation: it might be indicated, for each of the families explored, to summarize how it relates to social learning and how it differs from it in one sentence [each]? Alternatively, perhaps we could mention whether the family is 'a cousin' (related), a child (part of SL) or a parent of SL (a bigger whole of which SL is part)?*).  
(*Other process observation: although the text below follows the order proposed above, there is no problem in changing that order and restructuring, entirely, the sections of this draft learning brief*).  
  
**Title: the happy families of Social learning / convening a social learning orchestra**

**Introduction**

'Social Learning' might seem a muddled-up concept. It is not straightforward. It is not easy to get because it does not stem from one perspective only. It can be approached from various lenses and as a result lots of people are struggling to understand what it exactly means. As Rodela (2012) puts it “Interdisciplinary engagement, as well as choices in terms of what has been borrowed and how the borrowed concepts have been used, help to explain the heterogeneity of frameworks and definitions in the social learning literature.”

What seems clear is that social learning usually shares a number of features from those related fields, and as such causes confusion.

Within the Climate Change and Social Learning (CCSL) Initiative developed by the CGIAR Research Program on Climate Change, Agriculture and Food Security (CCAFS) and partners, we have adopted the following working definition of social learning:

"**Social learning approaches help facilitate knowledge sharing, joint learning and co-creation experiences between particular stakeholders around a shared purpose taking learning and behaviour change beyond the individual to networks and systems. Through a facilitated iterative process of working together, in interactive dialogue, exchange, learning, action and reflection and on-going partnership new shared ways of knowing emerge that lead to changes in practice.**"

The context in which this definition is applied is to tackle wicked problems such as chronic poverty, rural development and particularly climate change and food insecurity. The idea behind using social learning in this context is to examine and potentially change ideas, discourses, practices that are supposed to help tackle these wicked problems. Given the complexity of this agenda, social learning – and its focus on embarking diverse stakeholders on collective action – seems a very promising option.

But even in this context, where the brief is relatively clear, it is not easy to get the difference between social learning and, say, participatory action research, unless you've done some work with either (or both) approach(es).

So this brief is an attempt at clarifying social learning 'in relation' to other approaches and concepts.

Before proceeding, however, let's examine some of the key characteristics of social learning that are hinted at in the definition we offer:

INSERT: <http://ccsl.wikispaces.com/file/view/IMG_5316.JPG/421013478/320x424/IMG_5316.JPG>

* Social learning goes beyond mere 'learning' because of **the scale it is concerned with**. Social learning goes "beyond the individual to networks and systems". It is **transformative**, in the sense that it changes the level-playing field, beyond the sum of changes that affect each actor involved "SL is thus an emergent property of the process to transform the situation." (SLIM);
* Social learning is deep, it entails **looped learning**: it goes beyond searching for more efficient solutions to a problem (single loop learning), to sometimes considering the theory and assumptions guiding those solutions and looking for new types of solutions (double loop learning) or even to considering how we learn to learn and find more effective ways of coming up with dynamic, context-based, ever adaptive and proactive solutions to the endless series of new complex problems that arise.
* Social learning **is iterative**: it is not a one-off operation, however large scale it is; it concerns changes that affect entire groups of people in the medium and longer term, through events and joint activities, with regular feedback loops on those 'happenings', which progressively pave the way for transformation;
* Social learning **is often facilitated**: it is not always about learning that happens 'anyway', although in some cases social learning happens without (e.g. in the context of a disaster that strikes an entire community and brings together new solutions to the fore). However, given the complexity and sensitivity of relations involved in its processes, social learning often relies on carefully supported learning processes where issues of power and social differentiation are addressed to ensure proper representation from various groups, and mitigating power play from certain actors. In that context, facilitation often plays a role in creating good conditions to fee the transformative power of social learning. That does not mean to say that facilitation does not adapt along the way. On the contrary, it is often as emergent as the social learning process is.
* With respect to the importance of using everyone's presence to the maximum, social learning processes pay attention to the **capacities required** for social learning to unfold in the best possible ways. From interpersonal communication skills (listening, empathy, developing trust etc.) to documentation, leadership - see the '[profile of a social learning hero](http://km4meu.wordpress.com/2012/12/03/profile-of-the-social-learning-hero/)' for more about this.
* Social learning centrally entails '**co-creation**' of solutions. "SL seen as a process of co-creation of knowledge, which provides insight into the causes of, and the means required to, transform the situation. SL is thus an integral part of or constitutive of concerted action" (SLIM).
* Finally, and perhaps most importantly, social learning distinguishes itself from other approaches in as far as it is the result of **genuine *intent***to question and challenge the status quo and to consider if change is necessary and, if so, how it may happen. In many cases, that intent is not entirely there or consistently present among all actors involved, but it is essential that it becomes a shared purpose for all actors involved. True social learning will not happen if the intent of challenge and change remains the privilege of one or few actors. The intent on possible transformation has to be collective.

Now that we have laid some foundations for what we believe social learning is, we can examine the difference between a social learning approach and various related approaches.

**What broad fields (families) are related to social learning?**

Various broad fields are connected with social learning in some way, effectively playing as related families to social learning:

* The complexity / systems field – the most prominent field given the emphasis on complexity and wicked problems;
* The research field – since the work in CCSL is very strongly embedded in research;
* The (online) 'social' field, which is fast gaining traction these days;
* The 'learning' field and all its applications;
* And finally a mixed bag of other approaches that do not belong to specific 'fields' or families.

**a) Social learning and the 'complexity / systems field'**

The last major family that relates to social learning is that of complexity and systems thinking.

**Complexity and complex adaptive systems**

Complexity thinking is hailed, in the development and for-profit worlds, as the new paradigm in which we operate. With quite some ground. We do operate in a complex, highly interconnected world, and recent communication channels and social networks have both multiplied the connections between nodes and sharpened our sense of that connectivity and complexity.

As we realize the potential of 'complex adaptive systems' - which human groupings almost always are - we realize that complexity thinking is an important tool in our attempts at analysing our environment (our context).

Against this background, social learning is simply a more adapted approach at dealing with that complexity because it relies on more eyeballs, arms, legs, brains and hearts.

Complexity thinking is not so much a relative of social learning as the valley in which social learning operates - and it is also the canal through which social learning happens (the unpredictable flow that leads to an unknowable destination, despite conscious steps taken, one at a time, in a given direction). See below for more specific applications of complexity in the development (research) realm.

**Thinking about wicked problems and resilience**

Very much in line with complexity thinking and theories, in the field of development (research) and particularly in natural resource management and climate change, we are focusing on 'wicked problems' that are particular instances of the intractable, ultra-integrated, ultra-complex nature of development.

Climate change, poverty, food insecurity are not problems that can be dealt with one-size-suits-all solutions, blueprint approaches and off-the-shelf silver bullet solutions. They are problems, or more largely issues whose beginnings and root causes are difficult to discern and whose ends are impossible to predict. Arguably even solutions to these wicked problems do not exist. We simply must act and reflect about how we act. The more people are embarked in that process of action learning, the more likely we are able to understand ins and outs of these complex problems and develop capacities to deal with and proactively anticipate some of the likely consequences of these problems.

Resilience thinking relates to wicked problems in the context of fast changing environments, and particularly in the domain of climate change. Resilience "is the capacity of a system to absorb disturbance and still retain its basic function and structure" (Walker et al., p. xii). Resilience as a capacity that is stimulated among human beings and human groupings relates to the ability to deal with existing problems and upcoming challenges time and time again.

Where does social learning fit in all of this? It is perhaps simply the most indicated type of approach to deal with such wicked problems, and perhaps to build resilience / capacity to deal with yet unknown problems. The connection here is not really a family tie, rather a space in which social learning seems to thrive or find its most complete application. As for resilience thinking, social learning, by its dynamics of capacity development (and meaning co-creation) encourages resilience, perhaps even unconsciously. In turn, resilience thinking offers new avenues for social learning to be tried out. Resilience thinking is thus not a relative of social learning as much as a neighbourhood kid, and the games between the two benefit each other.

**Systems thinking**

Although many people mistake them for one and the same, systems thinking is different to complexity. This blog post is but one of the sources to unravel the differences: <http://sonjablignaut.wordpress.com/2013/10/28/5-differences-between-complexity-systems-thinking/>

Essentially, systems can be managed, complexity (and complex adaptive systems) can't.

"Systems thinking has been applied to problem solving, by viewing "problems" as parts of an overall system, rather than reacting to specific parts, outcomes or events and potentially contributing to further development of unintended consequences. Systems thinking is not one thing but a set of habits or practices[2] within a framework that is based on the belief that the component parts of a system can best be understood in the context of relationships with each other and with other systems, rather than in isolation. Systems thinking focuses on cyclical rather than linear cause and effect." (<http://en.wikipedia.org/wiki/Systems_thinking)>

Where systems thinking relates to social learning is that bringing together various diverse actors around an agenda that is not entirely known from the onset means that the system of which all actors are part is itself becoming increasingly clear. Social learning certainly tries to affect the entire system (that is the scale of transformation that social learning aspires to affect), however small that system might be in a given context.

**b) Social learning and the 'research field'**

Social learning has very close relatives in the field of research.

**Participatory research**

Perhaps one of the closest relatives, participatory research (and participatory approaches generally) borrows from social learning: the importance of social differentiation (involving other groups than just researchers in this case), the (relative) facilitation involved in training and guiding non-academic researchers in the process of research and thus the consideration for the capacities of the actors involved.

That said, "participatory approaches could actually just involve specific groups for specific activities but not really keep these groups front and centre, involved from the get-go and throughout the initiative." (<http://km4meu.wordpress.com/2013/04/21/whats-really-new-about-social-learning/)>. Indeed, participation can be conjured up for very specific parts of a research project, but may not mean that consciously selected diverse actors are taking part in every activity and decision and are co-creating meaning. Equally, there is no objective of 'transformation at scale' in participatory research, and there is not always much thought going into the possible power dynamics and participation biases in such activities.

Subsequently, participatory research could be considered a cousin of social learning, or one of the methods that could be used in a wider social learning approach, but no more than that...

**Action research (AR)**

Closely following participatory research, action research shares - with social learning - the concern for iteration, for learning - including looped learning - and for the intent of finding solutions. The main distinction with social learning lies in the fact that action research could be carried out as an individual initiative, it does not require *per se*the presence of diverse, complementary and representative actors.

Social differentiation and power are sometimes therefore largely absent from the discourse around action research - and there is usually very little need for facilitation in action research initiatives.

Finally, the scale of action research does not betray an ambition to achieve transformation at a large scale... For all these reasons, AR and SL are related but not the same, and once again, we are in presence here of one of the possible approaches used as part of a wider social learning initiative, if AR pays attention to all the factors that make the trademark of social learning. Sometimes, action research is also associated to 'action learning' and similar observations can be made about the action learning as to action research.

Participatory research and action research overlap in as far as their "common aim [...] is to change social reality on the basis of insights into everyday practices that are obtained by means of participatory research—that is, collaborative research on the part of scientists, practitioners, service users, etc." (Bergold et al.)

Participatory action research (PAR) combines the above two approaches as it "is an approach to research in communities that emphasizes participation and action. It seeks to understand the world by trying to change it, collaboratively and following reflection. PAR emphasizes collective inquiry and experimentation grounded in experience and social history. Within a PAR process, "communities of inquiry and action evolve and address questions and issues that are significant for those who participate as co-researchers" (Reason and Bradbury, 2008, p. 1)." (<http://en.wikipedia.org/wiki/Participatory_action_research)>.

Participatory rural appraisal (PRA) and participatory learning and action (PLA) are also associated with this strand of research.

**c) Social learning and the 'social field'**

In the social field, at least three different families are related to social learning:

**Social media and networks**

Social media and networks offer historically unparalleled ways to connect and engage with each other. They present a revolution in the way people interact and learn together. However, in social media, there is not necessarily an intent to connect, or for a looped learning approach and it is more often than not left free for all, unfacilitated. Similarly, the capacities of the differnet actors involved in social media interactions are not explicitly considered and worked upon.

On the other hand, social change movements that took place during e.g. the Arab Spring in the first quarter of 2011 combined various features of social learning. Social media and networks may be mobilized in social learning approaches, but usually they do not, in and of themselves, constitute social learning approaches.

**Enterprise 2.0 ('e2.0')**

Related to social media and networks, Enterprise 2.0 looks specifically at how companies are embracing social media to change the way business is done internally and externally. E2.0 is "the use of emergent social software platforms within companies, or between companies and their partners or customers". It aims to help employees, customers and suppliers collaborate, share, and organize information via Web 2.0 technologies." (<http://en.wikipedia.org/wiki/Enterprise_2.0)>

In relation with e2.0, a small group of prolific bloggers and social media engagement thinkers called the Time Alliance (and particularly Jane Hart among them) are regularly referring to 'social learning' but are mentioning that it relates to "*building communities and networks*". Jane Hart elaborates: "*though social learning is something that we have always done, it has often been ignored or misunderstood by the training industry. Now, however, the proliferation of social tools makes this a powerful way to improve workplace performance. When we consider what social learning means inside an organization, it’s not just adding social media to instructional programmes or letting people interact with one another. It’s more about helping people learn from one another as they work together – enhanced by collaborative enterprise social tools. Learning in today’s networked workplace is not just being trained to do a task, but about learning with and from one another as we face new challenges. In the connected enterprise there is a new role for HR, OD, and L&D departments.*"

In this sense, what we understand by social learning here is very different and, although it also relates to the use of social tools online, looks at transformative social change processes beyond the realm of The Organization.

**Crowdsourcing**

Crowdsourcing refers to "the practice of obtaining needed services, ideas, or content by soliciting contributions from a large group of people, and especially from an online community, rather than from traditional employees or suppliers." (<http://en.wikipedia.org/wiki/Crowdsourcing)>. In this sense, it shares features of social learning as it brings together various actors. In fact, crowdsourcing can be a 'modus operandi' for certain activities undertaken in a social learning approach (e.g. as has been the case several times in the CCSL sandbox), but it is not social learning by itself since it does not focus on learning, is not really facilitated but usually following the freeform and voluntary appproach of the Open Source movement. The way crowdsourced efforts deal with power and social differentiation are also not very clear.

**d) Social learning and the 'learning & knowledge field'**

In the social field, various families are related to social learning. Deeper down, these families also connect with (less famous) theories such as Mezirow’s ‘transformational learning’ (“An important part of transformative learning is for individuals to change their frames of reference by critically reflecting on their assumptions and beliefs and consciously making and implementing plans that bring about new ways of defining their worlds. This process is fundamentally rational and analytical. (Mezirow (1997)).

**Adult learning**

Adult learning - or andragogy - "is a theory that holds a set of assumptions about how adults learn. Andragogy emphasises the value of the process of learning. It uses approaches to learning that are problem-based and collaborative rather than didactic, and also emphasises more equality between the teacher and learner." (<http://www.qotfc.edu.au/resource/?page=65375)>

Adult learning is usually invoked in social learning, since most social learning initiatives relate to processes involving adults, particularly around aspects of facilitation, but also, though to a lesser extent, of social differentiation and power relations. However, adult learning is only a part of social learning and it is not concerned with transformation, with looped learning, with the scale of social learning etc. However some techniques that are used to stimulate adult learning, such as [Open Space Technology](http://en.wikipedia.org/wiki/Open_Space_Technology), are deeply transformative and may overlap very much with social learning, with perhaps less emphasis on social differentiation, facilitation and the collective scale (an Open Space could be used to generate individual solutions).

**Communities of practice**

A community of practice (CoP) is, according to cognitive anthropologists Jean Lave and Etienne Wenger, a group of people who share a craft and/or a profession. The group can evolve naturally because of the members' common interest in a particular domain or area, or it can be created specifically with the goal of gaining knowledge related to their field. It is through the process of sharing information and experiences with the group that the members learn from each other, and have an opportunity to develop themselves personally and professionally (Lave & Wenger 1991). There is much learning going on in a CoP and that learning can be purposeful, facilitated and happening at scale. However one key difference with social learning is that the social differentiation is somewhat more limited in as far as the profession or practice domain is homogeneous in a CoP. Still, conversation and reflection processes taking place in a CoP may resemble what social learning looks like in practice.

**Organizational learning**

Organizational learning (OL) "is an area of knowledge within organizational theory that studies models and theories about the way an organization learns and adapts (Vasenska, 2013:615). In Organizational development (OD), *learning* is a characteristic of an *adaptive* organization, i.e., an organization that is able to sense changes in signals from its environment (both internal and external) and adapt accordingly. OD specialists endeavor to assist their clients to learn from experience and incorporate the learning as feedback into the planning process." (<http://en.wikipedia.org/wiki/Organizational_learning)>.

Social learning may be applied to an organization and therefore almost equate organizational learning, but it differs fundamentally in the sense that an organization has a mandate (thus a clear goal in mind), usually has a formal structure and hierarchy (thus an established power structure that is enforced) and OL may also not be preoccupied with social differentiation. Looped learning is also not always an explicit objective of OL. Not all OL projects or activities are formally facilitated, although they are usually driven and 'managed' (noting here that facilitating and managing processes are two very different things. For more about this see: <http://km4meu.wordpress.com/2012/09/02/managing-or-facilitating-change-not-just-a-question-of-words>. In some cases, OL can result in profoundly transformative processes and results, but the starting premise of OL in formal boundaries makes it a distant cousin of social learning.

**Knowledge management**

Knowledge management (KM) is an equally diffuse field in which most actors involved also do not always agree on the very definition of that field and its term. KM is broadly concerned with the use of information (explicit, codified, tangible) and knowledge (tacit, intangible) assets and related processes (needs identification, creation, sharing, application, evaluation). KM usually combines information management, knowledge sharing and increasingly learning to identify ways to use those assets to achieve one's (whether an individual, team, organization or even society) goals more effectively and more proactively.

The connection with social learning is the fact that KM conjures up knowledge sharing, facilitation, learning and some tools that are typically used in social learning initiatives. However, it fails to consistently address social differentiation and power issues, it is not necessarily applied at a large scale nor repeatedly seeks change and transformation.

In this respect, KM is a close cousin to social learning, it is also part of social learning, but they are two families that share members only to a certain extent...

**Innovation systems and platforms**

Perhaps the confusion in the relation between social learning and innovation comes from the particular 'innovation platform' approach, which usually entails social learning. Innovation platforms - as well as 'learning alliances, R4D platforms etc.' - are multi-stakeholder platforms, usually connected to one another across geographic areas and across scales (from grassroots level all the way up to national or even international level) in order to crack complex problems or deal with complex agendas. In this sense, the activities of such platforms, over time, in multi-stakeholder processes (MSPs) align very closely with social learning. In a way, MSPs are perhaps the most complete 'form' of a social learning approach, in the sense that they bring together a diverse participation, are usually facilitated, keep a keen eye on power issues, and pay attention to the capacities of the actors involved. However, one cannot say that MSPs 'are' social learning, because they may not work iteratively and may not focus explicitly on learning, let alone looped learning. Sometimes MSPs are run simply to bring everyone together to discuss a given issue for a short period of time, or even just to inform various groups of people.

MSPs and particularly innovation platforms are thus often part of social learning, but they are so only if they work iteratively and with deep learning in mind, and they are the most time-consuming and labour-intensive forms of social learning approaches.

**Process/product innovation**

The broader field of (process/product) innovation is, on the other hand, quite different from social learning, even though principles of innovation overlap quite a bit with social learning: iteration is essential (short feedback loops and failing fast to reveal the strongest parts of innovation), diverse perspectives (since innovation is usually found at the edges), looped learning (double and triple loop learning are at the heart of innovation), the aspiration to change and potential transformation. Particularly the field of ‘open innovation’ is much more social by nature and shares many features from social learning.

Where innovation differs from social learning, nonetheless, is in the fact that the diverse views are used 'instrumentally only', not for the benefits of all actors involved but for the overall benefit of innovation itself. If innovation happens with fewer actors, there is no problem with it. Except in open innovation, there is no specific 'socially caring/inclined' dimension of innovation. Power is not always addressed in innovation efforts. Facilitation is not always present in innovation - which actually requires a lot of freedom and 'blue sky thinking', and the scale of innovation is large only if the innovation in mind has wide application, but it is no given.

Innovation is thus not a close relative of social learning: it shares some common features and aspirations – particularly in its open variation – but does not fulfil the same agenda and has a rather different focus to start with.

**e) Social learning and all other akin approaches**

**Gender and equity**

There is very little overlap and confusion possible between social learning on the one hand, and gender & equity on the other hand. Gender and equity relate to the social differentiation factor of social learning. It is an essential dimension of quality social learning, but the specific field of 'gender' itself is very different to that of social learning, even if social learning approaches might be applied in that field to bring different perspectives to understand the stakes of the gender and equity agenda and find ways to improve the reality that it describes.

At any rate, gender and equity and social learning fondle a common concern for transformation, to the extent that gender activists are talking a lot about 'gender transformation' as their holy grail.

Verdict? Gender and equity are very distant cousins from social learning.

*LEFT ASIDE FOR NOW*

* Development - stakeholder engagement, participation: *[ELB] Perhaps this ought to be a specific family of its own. I don't know. Anyhow right now this is addressed above under learning/knowledge (stakeholder engagement) and under research (participation). It's not a 100% fit but haven't found answers/solutions for now...*
* Watershed management, community-based natural resources management - ELB: Wiebke, I think these are fields in which social learning is applied, but personally I don't see any natural risk of confusion between such domains and social learning. Otherwise it's like comparing 'communication' and e.g. 'infrastructures', or 'water & sanitation' - you reckon?
* Facilitation [*ELB: Upon reflection, I don't think this should be mentioned, as it's quite obviously just a dimension of social learning*]
* ICT4D - would deserve another brief altogether.

KEY RESOURCES:

* "What is Social Learning" academic paper by Reed et al. (2010) in *Ecology and Society*
* "The acoustics of social learning: designing learning processes that contribute to a more sustainable world" paper by Arjen Wals, Noor van der Hoeven and Harm Blanken, see page 11, "Key features of social learning"
* Social Learning for integrated water managing (SLIM): <https://sites.google.com/site/slimsociallearningforiwm/social-learning>
* Bergold, J., & Thomas, S. (2012). Participatory Research Methods: A Methodological Approach in Motion. *Forum Qualitative Sozialforschung / Forum: Qualitative Social Research, 13*(1). Retrieved from <http://www.qualitative-research.net/index.php/fqs/article/view/1801/3334> (accessed 9 April 2014)
* Mezirow, J. (1997). Transformative Learning: Theory to Practice. New Directions for Adult and Continuing Education, 74, 5–12.
* Rodela, R. (2012). The social learning discourse: Trends, themes and interdisciplinary influences in current research. in *Environmental science & policy 25* (2013). pp. 157-166.
* Vasenska, I. (2013). Organizational learning and employee empowering increasing tourist destination performance.
* Walker, B.H. and Salt, D. (2006). Resilience Thinking: Sustaining Ecosystems and People in a Changing World. 174p. Island Press, Washington, D.C., USA.

This brief was also inspired from these three blog posts:

* <http://km4meu.wordpress.com/2013/04/21/whats-really-new-about-social-learning/>
* <http://km4meu.wordpress.com/2011/11/21/communication-km-monitoring-learning-the-happy-families-of-engagement/>
* <http://km4meu.wordpress.com/2012/12/03/profile-of-the-social-learning-hero/>.