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**An exploration of prospective sensemaking in the eye  
of poverty alleviation: Insights from an international  
non-governmental organisation**

**by**

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## Declaration

This thesis is the personal work of Camilo Arciniegas Pradilla. The thesis titled “**An exploration of prospective sensemaking in the eye of poverty: Insights from an international non-governmental organisation**” is submitted in partial fulfilment of the degree of PhD at the University of Warwick. The thesis has not been submitted for a degree at any other university.

The interpretations that this thesis contain are based on my reading and understanding of the original texts and they are not published anywhere in the form of books or articles. The books, articles and websites, used to produce this thesis are acknowledged at the respective place in the text and in the bibliography.

## Preface and publications

This thesis consists of three interconnected papers. Together, they offer an overarching view of future-oriented or prospective sensemaking in the context of poverty alleviation. Some of these papers have been presented at different academic conferences. In addition, one of them has been submitted to a peer-reviewed journal. The specific details of each paper are listed below.

The first paper (chapter 3), titled “Managing the changing manifestations of poverty: The case of Fe y Alegria 1955-2017”, is mainly empirically driven. In this paper, I set the context of the thesis by providing a comprehensive background of poverty and a non-profit organisation dedicated to poverty alleviation. However, chapter 3’s central focus is the emerging phenomenon of wicked problems and how these problems challenge current notions of meaning making and collective action. In 2019, a version of this paper was submitted to the journal *Research in the Sociology of Organisations* for its volume “Grand Challenges & New Forms of Organizing”.

The second paper (chapter 4), under the title “Mapping expectations about the future in strategy making: Alleviating poverty in a networked organisation”, was presented at the 36th European Group of Organisational Studies colloquium in Edinburgh, UK, in July 2019. Empirically, this paper examines the future-oriented sensemaking processes of diverse organisational actors and their implications in strategy making. Theoretically, the second paper provides an in-depth description of prospective sensemaking in terms of temporal orientation, narrative forms and actors’ perceptions of the future. Finally, it discusses the associated problems when dealing with multiple expectations in strategy making processes.

The third paper (chapter 5) is titled “Moving the frontiers for wicked problems — The role of metaphors in prospective sensemaking”. It was presented at the 9th International Process Symposium in “Institutions and Organisations: A Process View” in Kos, Greece, in June 2017. A revised version was presented in Chicago, USA, in August 2018 at the 78th Academy of Management Conference in the paper session on the dynamics of collective sensemaking (<https://doi.org/10.5465/AMBPP.2018.15091abstract>). This paper builds on the previous two papers by offering a solution for organising in the

context of wicked problems based on the dialogic construction of metaphors. Theoretically, it extends prospective sensemaking concepts by explaining the future continuous: a construction in which actors move from already transpired futures to futures in the making and discovery. This paper provides theoretical closure to the problem of making sense of the future when reducing poverty in multiple contexts.

## **Abstract**

This thesis consists of three interconnected papers. Together, they offer an overarching view of future-oriented or prospective sensemaking in the context of poverty alleviation. The first paper is mainly empirically driven. It provides an analysis of poverty. In doing this analysis, findings challenge current notions of meaning making and action in organisational settings. The second paper examines the future-oriented processes of different organisational actors and their implications in strategy making. Theoretically, this paper explores problems around multiple expectations in strategy making processes. The third paper builds on the previous two providing an answer for organising in the context of wicked problems. Acknowledging the open-endedness nature of the future is crucial to move from transpired futures to futures in the making and discovery. A qualitative methodology was adopted in the three papers. The first two papers draw on narrative analyses while the third paper uses Gioia methodology. The overall contribution of the thesis is to offer a new vision of the future in the sensemaking literature. Here, the future is a fluid and multi-authored construction in which contextual constructions will enable actors to construct multiple pathways. As a practical implication, this thesis underlines the need to embrace the construction of complex metaphorical images that allow actors purpose convergence and action divergence.

# Chapter 1 Introduction

## 1.1 The future—is it really a problem? Dealing with the future in an era of wicked problems

The impetus behind this thesis is the need to understand how organisational actors deal with the future in contexts dominated by dynamic changes and contested views as in the case of wicked problems. Such problems can be defined as extreme social challenges caught in causal webs of interwoven variables, without clear boundaries and where knowledge is distributed among several actors, thus complicating their diagnosis and prognosis (Reinecke and Ansari, 2016). A nuanced understanding of wicked problems in management is relevant in order to theorise topics that have been neglected and require further attention in the literature. In the case of this thesis, these topics refer to organising in dynamic environments (Lê, 2013; Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015; Weick et al., 2005) and to time as a multiple rather than a single concept (Bluedorn, 2002; Dawson and Sykes, 2019; Reinecke and Ansari, 2015). To begin analysing this question, I first unpack what the future is while explaining how modern societies engage with it. Then, I briefly discuss some management perspectives that can help elucidate this notion of the future. After this discussion, I delve into why and how sensemaking provides a starting point to untangle this question in terms of organising and strategizing. Finally, I explore how wicked problems challenge the modern idea of the future while adding new dimensions to sensemaking theorising.

Quite broadly, the future can be defined as “*what [...] has not yet happened so has not yet come into being*” (Dawson and Christopher, 2016, p. 3). This definition is familiar and pervasive in our daily life. Examples of the future becoming explicit in our thinking include (i) when we imagine whom we want to be, (ii) what we want to study, and (iii) when we imagine professional paths. Nevertheless, the future was not always something that humans could imagine freely. In this sense, Giddens (1999) argues that one of the most significant changes between traditional cultures and modern societies is the fact that individuals left behind the idea of a god determining their future.

Abandoning the notion of an already predetermined future, allowed human beings to see the future as something that could be imagined, colonised and controlled (Giddens, 1999). This view is shared by Adam (1990) who asserts that modernity allowed a shift from

conceiving of the future as something “pre-given” by divine entities to an individual projection based on hopes, desires and dreams. Not only sociologists appear seduced by this idea. Schutz (1967), a philosopher, contends that although the future will be always unknown, human action can create through imagination desirable images which, in turn, will provide the meaning for action. Interestingly, this notion of a conquerable future has reduced social time to a linear construction associated with causal links among different successive events (Adam, 1990; Nowotny, 1994).

The modern conception of the future has been extremely relevant for organisations, specifically, when thinking about strategizing and organising. For instance, Weick (1979) believes that the future can be disciplined through purposeful action. Accordingly, Kornberger (2013) maintains that disciplining the future is possible through strategy. Thus, “*strategy’s power resides in its ability to enact the future in the present. The big picture that illustrates the future provides the rationale for actions in the present*” (Kornberger, 2013, p. 106). As a result, strategic issues such as resource efficiency (Pitsis et al., 2003) and organisational standardisation (Costanzo and MacKay, 2009) can be better analysed. Similarly, in terms of organising, a conquerable future has revealed the need for schedules and deadlines for coordinating organisational action (Cunliffe et al., 2004). On the one hand, schedules make organising more manageable by creating routines (Dawson and Christopher, 2016) and shaping what is socially acceptable in the organisation (Costas and Grey, 2014). On the other hand, deadlines contribute to increasing actors’ accountability (Lee and Liebenau, 1999) and controlling potential deviations from the desired image of the future (Pitsis et al., 2003).

This need to conquer the future—understood as taking control of what has not yet come into being—can be appreciated most strikingly in three management perspectives: (i) long-range planning, (ii) scenario planning, and (iii) future perfect thinking process of sensemaking. First, the long-range planning perspective holds that through analytic processes, such as statistical methods, we can manage organisational goals, plans and actions (Ansoff, 1980). Here the use of historical data in conjunction with time series and linear models can estimate future outcomes (Hogarth and Makridakis, 1981). Second, according to the scenario planning perspective, scenarios are descriptions of a future situation explained by a chain of causal events. Scenarios can be constructed using logical

assumptions, computational simulations and causal cognitive maps (Amer et al., 2013). Finally, future perfect thinking draws on Schutz's (1967) idea that the future can be better understood when individuals think it has already occurred (Weick, 1979). Future perfect thinking is the future-oriented process of sensemaking, a retrospective perspective that explains meaning making and action in the social world. In this way of thinking, actors project an outcome as already accomplished and then try to reconstruct the ways to make it possible under assumptions of plausibility rather than accuracy (Weick et al., 2005). Weick (1979) argues that a plan works because it can be referred back to analogous action, not because it anticipates the future.

However, from a philosophical perspective, it is not even clear whether the future exists at all. Some philosophers, such as Heidegger (1998), Mead (1932) and Dewey (1915), contend that the only way to understand the future is through the temporal analysis of human experience. In this analysis, the past, the present and the future interweave in several ways, thereby influencing meanings, actions and experiences. As a consequence of these temporal processes, actors will try to anticipate, project and influence the future in everyday life. In order to do so in desirable ways, individuals will necessarily focus on processes of meaning making and action in the social world. Analysing these processes simultaneously in the context of ambiguity and uncertainty is not an easy task. Of the three previously discussed perspectives, it is only sensemaking that provides theoretical and empirical insights in cases of crises, contradictory information, ambiguous contexts and contested meanings.

Sensemaking is defined as a “*process that is [...], (3) enactive of sensible environments, (4) social, (5) ongoing, (6) focused on and by extracted cues, (7) driven by plausibility rather than accuracy*” (Weick, 1995, p. 17). It has been extremely effective in explaining how individuals create, interpret and recover meaning while acting in the social world. As a process, sensemaking consists of three inter-related processes: (i) creation, (ii) interpretation and (iii) enactment (Weick, 1995). Creation involves the activities of selecting and bracketing cues about the interrupted situation; interpretation occurs when cues are organized and narratively linked to produce an account, and enactment involves putting the account into action while overcoming the interrupted situation (Sandberg and Tsoukas, 2015). Overall, this construction of meaning is relevant to elucidate what

happened, what is happening and what will have happened, thus providing grounds for action.

However, the emergence of wicked problems and dynamic environments disrupting organisational processes has pushed our understanding of the future further. In line with these challenges, scholars have recently begun seeking new notions of prospective sensemaking that are not grounded only on retrospection (Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015). While prospective sensemaking through “the future perfect” is a valuable tool to explore meaning construction about the future, it requires actors to reduce its open-ended nature. This may not be a problem for futures in which actors have control over resources or where hierarchical control can be exercised. Unfortunately, such conditions are not present in the context of wicked problems.

Introduced by Rittel and Webber (1973) in the planning literature, wicked problems are defined as societal problems that are difficult to solve because of incomplete, contradictory and often changing manifestations. Examples of wicked problems include poverty, global hunger and climate change. Management scholars have recently woken up to the challenge of developing theories that address major societal and environmental problems (See George et al., 2016)<sup>1</sup>. Remarkably, wicked problems do not follow linear dynamics and are constantly changing, making their diagnosis and prognosis difficult (Reinecke and Ansari, 2016). Hence, it is impossible to think about them in terms of something that has already occurred as the future perfect thinking suggests. Additionally, in wicked problems, meaning is extremely contested with regard to definitions and possible responses. This situation contrasts with processes where actors can attempt to influence a preferred future through hierarchical positions.

However, at the core of sensemaking theory, we can find a new understanding for dealing with the future—specifically in its three processes: (i) creation, (ii) interpretation, and (iii)

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<sup>1</sup> This paper acknowledges the need to research major social and environmental problems under the lens of grand challenges. In this sense, this thesis prefers the notion of wicked problems, which is closely related but differs in two significant ways. First, in contrast to grand challenges, wicked problems are better defined under ten identifiable dimensions. Second, according to George et al. (2016) grand challenges can be plausibly addressed. It is my contention that problems such as poverty, hunger and human trafficking are not solvable even if coordinated action and collaboration occur.

enactment. As wicked problems occur in the social world, it is only through lived experience that actors can try to make sense of what happened and what is going on to engage in future action. Furthermore, when explaining lived experience, sensemaking is one of the few perspectives that bridges temporal and collective dynamics for organising (Maitlis and Christianson, 2014) and strategizing (Cornelissen and Schildt, 2015).

Finally, in contrast to scenario planning and long-range planning that rely heavily on past data or logical assumptions, sensemaking has explored what actors do when they do not have a full understanding of the situation. Viewed together, bringing current sensemaking literature and future-orientation into the context of wicked problems presents somewhat of a conundrum, which is the fundamental theoretical challenge that this thesis seeks to address.

To summarise, the idea of conquering the future has been relevant in modern societies to make individuals aware of the power they have when thinking about where to go and how to get there. This idea has permeated management theories, making the future a more manageable variable. However, with the rise of wicked problems, the existing notion of the future is challenged. In the case of wicked problems, dealing with the future cannot be carried out solely by thinking as if it has already occurred (Gioia et al., 2002; Weick, 1969) or as if it can be controlled (Pitsis et al., 2003). This is because organisational actors are immersed in interwoven, dynamic and complex structures where future actions, plans and expectations rely on the interplay among diverse factors under and beyond the organisations' control. Therefore, more research is needed to understand how organisational actors deal with the future in contexts dominated by dynamic changes and conflicting views.

## **1.2 Research Gap and Research Question**

As previously discussed, sensemaking has been a meaningful perspective to explain how organisational actors deal with the future for organising and strategizing. This is possible either through the future perfect tense or through sensegiving attempts. However, as the future has been mainly studied as an ex-post construction (MacKay, 2009) or as if it has already occurred, the extant literature has been unable to offer adequate explanations for issues around wicked problems. In these problems where it is not desirable to reduce the

open-endedness of the future and where power dynamics play an important role, we can find a diminished ability of current sensemaking theorising to clarify how individuals deal with the future (see section 2.5 for more details).

This need to expand our understanding of the dynamics between the future and sensemaking, known as prospective sensemaking, has received the attention of various scholars (Brown et al., 2015; Holt and Cornelissen, 2014; Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015). Nevertheless, few studies have explored the matter empirically. The relatively scant literature on prospective sensemaking could be attributed to the difficult endeavour of departing from Karl Weick postulates (Dawson and Sykes, 2019; Introna, 2018) or questioning the retrospective nature of meaning (Stigliani and Ravasi, 2012). Given these gaps in the literature, this thesis aims to shed light on the following overall research question:

*“How do organisational actors deal with the future in contexts dominated by dynamic changes and contested views as in the case of wicked problems?”*

Drawing on the case of Fe y Alegria an international non-governmental organisation that works to alleviate poverty, this research explores issues around the future and distributed processes of sensemaking when dealing with wicked problems. The thesis is presented in three interconnected papers, each one contributing differently to address the overall research question as follows:

Paper 1 is the most empirically oriented of the three, as it is driven by the need to better understand the nature of wicked problems and how they may complicate future-oriented action. This paper presents the context of wicked problems where the future is fluid and open-ended. In addition, it describes the numerous ways of creating what is plausible, depending on levels of description and modes of engaging with the social world. Finally, it links organisational actions to broader theoretical realms such as collective action and distributed experimentation.

Findings of paper 1 related to collective action and distributed experimentation—namely the need to engage in multilevel actions, creating participatory structures and finding ways to create small wins—constitute the starting points of papers 2 and 3. Thus, in paper

2, as sensemaking of the future highly depends on expectations that individuals construct in social interactions (Adam and Groves, 2007; Konlechner et al., 2018), attention is directed to the ways of creating small wins represented in the different expectations that actors form when attempting to alleviate poverty. Thus Paper 2 contributes to address the overall research question by analysing the narrative formation of expectations of different organisational actors when planning responses to tackle a wicked problem.

In this sense, as strategy is a contested process of meaning construction (Balogun et al., 2014) with multiple competing interpretations, it is necessary to find a solution for action. Accordingly, Kaplan and Orlikowski (2013) argue that temporal work articulates how actors resolve differences and link their interpretations of the past, present, and future in one strategic account that enables action. However, recently, temporal work has been criticised for being politically naïve (Granqvist and Gustafsson, 2016) and for failing to account for temporal differences (McGivern et al., 2017). Thus, Paper 2 also offers an analysis about the influence of organisational actors' expectations in strategy making process when tackling a wicked problem.

Finally, articulating paper 1 and paper 2 requires delving into issues about participatory structures and multilevel actions while acknowledging that expectations about the future may vary. Given the assumption that the future depends on several actors, cannot be controlled and cannot be pictured as a static construction, Paper 3 explores the construction of complex metaphors that bond actors in one body while allowing singular action in their context of operation. Taken the three papers together this research offers a comprehensive answer that bridges and extends research on prospective and distributed sensemaking.

### **1.3 Methodology**

This study investigates how organisational actors deal with the future in contexts dominated by dynamic changes and contested views as in the case of wicked problems. It assumes that organisational reality is a social construction rendered through intersubjective processes of meaning (Gergen and Davis, 2012). Therefore, I prioritise an analysis of the construction, production and transformation of meanings between and within individuals' interactions that constitute and are constitutive of reality (Berger and

Luckmann, 1991). Ultimately, I seek to understand meaning in its social environment by analysing its components over time and space (Gergen and Davis, 2012). The subsequent sections provide an overview of the research philosophy and methodology as well as a discussion of my analytical approach and personal reflections.

### *1.3.1 Interpretivist philosophy*

To illuminate the multiple constructions and transformations of meaning within a particular social context, this research is grounded on an interpretivist philosophy (Saunders, 2011). It builds on the rejection of the objectivist view of meaning by acknowledging that meaning does not reside independently of the social actors (Lincoln and Guba, 1985). Hence, from an ontological stance, reality is subjective and socially constructed based on how individuals make sense of the world around them and how they continually construct and interpret social environments (Saunders, 2011). Consequently, the epistemological perspective is both relativist and subjectivist. In other words, there is no objective truth to be known; rather, a range of interpretations can explain the social world (Lincoln and Guba, 1985). The interpretivist philosophy was adopted for this research because it recognises that organisational contexts are social arenas where meaning is unique and complex, involving contextual and individual circumstances (Saunders, 2011). In this thesis, meaning and its contextual interrelations are crucial to our understanding of what people in organisations do to explain their thoughts, intentions, and actions (Gioia et al., 2012).

This view has three implications for this study. First, it implies that there are multiple constructed realities that do not necessarily have to be similar to each other (Saunders, 2011). As such, the emphasis is to understand the processes of reality construction and actors' enactment. Second, the individual constitutes a primary key to understanding the phenomenon, as the knower and the known are inseparable. As Lincoln and Guba (1985) note, it would be almost impossible to understand meaning making processes in social contexts without studying who produces it. Finally, since each individual has his/her own views, the focus of the research is to identify and contextualise meaning as well as create a joint reconstruction of how those views co-produce reality (Gergen and Davis, 2012).

### *1.3.2 Research methodology*

#### *1.3.2.1 Qualitative perspective*

In order to understand meaning constructions over time and their implications in organisational reality, I chose a qualitative perspective. Specifically, this approach enables researchers to study social phenomena with people who are constitutive in their environments (Cresswell, 1998). In the context of wicked problems where there are multiple and conflicting meanings, qualitative research provides a unique advantage to delve deeply into questions relating to how and why actors do what they do. Furthermore, qualitative research is most useful to study phenomena that are not easily observable (Cresswell, 1998). The way organisational actors engage with the future and how they try to tackle a wicked problem can be better analysed if we derive the data from lived experience. Also, qualitative research is most suitable for capturing the many nuances of actors' expectations, behaviours, narratives and social interactions. As most qualitative research aims to provide an understanding of social meanings, a quantitative perspective would not offer such rich, multi-faceted insights (Silverman, 2013). Another advantage of a qualitative perspective is its convenience in terms of theory development, as it provides opportunities to elicit detailed insights of the phenomenon (Cresswell, 1998). It is only through detailed insights that prospective sensemaking and a thorough understanding of wicked problems can be achieved. Moreover, as Denzin and Lincoln (2011) argue, qualitative research focuses on the interpretive understanding of human experience. In this case, human experience is the starting point for understanding the processes of meaning making and enactment for the future of organisational actors in the context of wicked problems. Finally, qualitative research is best suited to study questions of how and why individuals differ in making sense of a common experience (Denzin and Lincoln, 2011).

The aforementioned features of qualitative research help build a solid foundation from which to explain sensemaking processes. Since sensemaking is about plausibility rather than accuracy (Weick, 1995), a qualitative perspective can provide a multiplicity of plausible narratives that help explain actors' experiences and meaning making processes. In addition, sensemaking of the future is a relatively under-researched phenomenon (Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015). Thus, a qualitative

perspective facilitates the acquisition of novel perspectives on the phenomenon (Cresswell, 1998), and more importantly, more multi-layered accounts for inductive analysis (Cresswell, 1998).

### *1.3.3 Research design: Case Study*

A case study was selected as the most fitting research design because it allows the examination of a phenomenon in its natural setting (Yin, 1994). Also, a case study is deemed to be the most significant design to answer “how” and “why” questions where the researcher cannot execute control or impose a desired outcome (Yin, 2014). Additionally, case studies are relevant to investigate complex and dynamic processes because variables and relationships are not clearly delineated. In order to arrive at plausible explanations, the researcher must explore the context to identify these variables and relationships. Finally as Yin (2014) argues, a case study design offers an unusual opportunity to be more transparent with the analysis of data. This is because the researcher has to draw from different collection methods and analytical tools to provide a theoretical explanation of the phenomenon.

As the aim of this study is to understand how organisational actors deal with the future in contexts dominated by dynamic changes and contested views, as in the case of wicked problems, a significant question arises regarding the most appropriate case for observing the phenomenon. Following Eisenhardt (2011) and Eisenhardt and Graebner's (2007) suggestions, I started searching for an extreme case to reveal salient differences and to move away from current sensemaking theorising. The search involved four criteria. First, the organisation had to be at the intersection, that is, currently dealing with a wicked problem. This criterion was especially relevant to emphasise the definition, strategies and routes of action of wicked problems that are contested by nature (Reinecke and Ansari, 2016). Second, the organisation needed to have a relatively established history in dealing with the wicked problem. Temporally speaking, it had to provide a clear background in which meaning could be studied via a processual lens. Third, the organisation needed to have a sufficiently large employee base. The analysis of the future in contested environments could be better appreciated by analysing multiple and heterogeneous actors. Finally, it was important to select an organisation with a relatively flat hierarchy. This

feature was perceived as relevant to explore processes where authority did not play a significant role in the meaning construction of the future.

#### *1.3.4 Case Selection: Fe y Alegria*

During my search, I learned that my second supervisor had established a working relationship with the Jesuits<sup>2</sup>. For several decades, the Jesuits have been managing an organisation known as “Fe y Alegria”, hereafter “FyA”, the largest non-profit network of education for impoverished communities of the world. Operating in 21 countries and incorporating more than 40.000 employees, FyA is an international non-governmental religious organisation (Federacion Internacional Fe y Alegria, 2016a). Most of the countries it serves are in Latin America, although there is a growing presence in Europe and Africa. The central mission of FyA is to educate people in contexts of extreme poverty so they can be empowered and generate social change in their communities. To educate people, FyA runs schools in rural areas abandoned by the state and in urban slums without public services.

In organisational terms, FyA encompasses 21 national offices, each of which operates autonomously. These 21 national offices are part of an International Federation that functions as a network with strong relations of interdependence. Within this network, the constructions of responses to alleviate poverty are achieved through convergence. FyA actors construct five-year strategic plans that set collective visions structured around educational projects. I found that this case not only included the four previously mentioned criteria but also provided a clear setting to explore the undesirability of reducing the open-endedness of the future. Although the problem of widespread poverty has received scholarly and governmental attention, it remains a problem without known solutions. Thus, this particular social issue constitutes suitable case for exploring the future.

The process of getting access to FyA was an arduous endeavour, as it involved several meetings over the span of a year with representatives of the organisation in Madrid.

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<sup>2</sup> The Jesuits: The Society of Jesus is among the oldest Catholic orders. The history of the Jesuits is closely related to education and the promotion of justice. The option for education and justice is currently exemplified by the Theology of Liberation, a movement started in Latin America in the 1960s.

Usually, these meetings surrounded topics related to how the intended research would benefit the organisation. As such, conversations were often framed around strategic issues. This framing of the research was fundamental as the organisation was currently under a strategic review process. To obtain approval for access, I provided a research proposal specifying tangible outcomes for the organisation. These outcomes included an analysis of the strategic review process in a business report and a presentation for the national directors to elaborate on the report. Finally, the necessary access was granted in 2016, opening doors not only to the national offices but also to the strategic process conducted<sup>3</sup>. Table 1.1 summarises the key features of FyA for this study.

**Table 1.1 Case criteria and Fe y Alegria**

<b>CRITERIA</b>	<b>FE Y ALEGRIA</b>
Organisation at the intersection/dealing with a wicked problem.	Wicked problem: Poverty.
Organisation needed to have a relatively established history in dealing with the wicked problem.	Foundation in 1955 in Caracas, Venezuela. Expanded to 20 countries in the last 60 years.
Organisation with a sufficiently large employee base.	Includes 21 national offices and international federation. Accounts for more than 40.000 employees including the schools.
Organisation should have a relatively flat hierarchy.	21 independent national offices, operating in conjunction in an international federation for collective educational projects.
Extra: provided a clear setting to explore the undesirability of reducing the open-endedness of the future.	For example, poverty in Central American countries mainly refers to violence and the absence of opportunities for human development. When dealing with these problems, reducing the future to a specific outcome obscures relevant social, political and even environmental processes happening simultaneously and that directly influence poverty.

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<sup>3</sup> Chapter 5 (paper 3) provides further explanation of the strategic review.

### *1.3.5 Data Collection*

Methodologically speaking, capturing how organisational actors of FyA made sense of the future to deal with dynamic changes and contested views required a process lens and a varied set of data collection techniques. In this research, a process lens was instrumental in identifying the emergence and development of organisational processes through longitudinal accounts (Langley et al., 2013). Specifically, such a lens was relevant to focus on the empirical problem: the changing manifestations of the problem of poverty while theorising explicitly its progressions as elements of explanation and understanding (Dawson, 2014). Adhering to this focus was not easy, as it involved (i) constructing a rich account of poverty and the organisation, (ii) travelling to four countries to follow strategic processes happening over two years, and (iii) interviewing several organisational actors about their lived experience. To study the phenomenon, three main data collection instruments were used: participant observations, semi-structured interviews and documents (public and private) of the organisation. This broad range of methods generated a robust array of unique information that could not be found anywhere else. While all the data can be considered valuable, the reams of data gathered from the ethnographic observations are integral to our understanding of the phenomenon studied. This data received particular attention in paper 3 (respectively chapter 5). The design and implementation of the research instruments is discussed below, albeit briefly. Further details can be found in chapters 3, 4 and 5.

#### *1.3.5.1 Ethnographic observations*

As noted above, ethnographic observations provided the most important source of data for this research. These observations required travelling to Lima (Peru), Bogota (Colombia) and Asuncion (Paraguay). In total, I attended 65 meetings focused on strategy making. They accounted for 192 hours over the course of 2016 to 2018. In these meetings, I could follow the process of moving from a static and standard idea of the future for all members to something that acknowledged differences and that left room for the unexpected. I also travelled to Madrid, Spain, for three days in 2016 and two in 2017 to explore project managers' daily activities. This group is in charge of designing projects, which are the primary funding source for international projects. In addition, I visited El Escorial, Spain, for three days to witness the implementation of two federative projects

and the national meeting of FyA Spain. Finally, in 2018, I had the opportunity to present the findings of my research at one of FyA's strategic meetings in Ilhéus, Brazil.

During the entire process, the interactions with FyA members were essential to validate and question some of my accounts (Atkinson and Hammersley, 2007). During the ethnographic observations, I filled four notebooks, comprising 385 pages. These pages included my research diary and field notes, following Van Maanen's (2011a) suggestion of recording any event, idea, hunch or analysis. These copious notes later provided the starting points for the analysis of this study. Although essential to my research, travelling to various countries, most of which were outside Europe, proved to be exorbitant. However, small bursaries from the ERSC and the University Warwick enabled me to pursue my field work. The final trip to Ilhéus, Brazil, was paid through a research project that my second supervisor was working on with the same organisation. While the whole process of the strategic review and ethnographic observations took place in Spanish, this fact never posed a problem, as I am a native speaker of Spanish.

The observations of the strategic process usually occurred in religious places (monasteries and retirement houses). There were also some visits to local schools in Peru, Colombia and Brazil. During these data collection trips, I was accommodated in the same places as the actors. Consequently, I had the opportunity to share informal talks, masses, breakfasts, lunches and dinners with national directors, board members and operational staff, allowing full immersion in participants' practices (Van Maanen, 2011). Being immersed in the routines of FyA members played a valuable role in establishing a level of trust with them. At the beginning, I was perceived as a spy and even referred to as such explicitly during meetings. However, I suspect that being from South America also gave me an advantage. The informal conversations I engaged in during breaks and meals—in conjunction with my visits to local schools—contributed to a transition from the image of an external visitor to that of a familiar visitor, someone who was close to the organisation and the contexts in which it operates.

#### 1.3.5.2 Semi-Structured interviews

Semi-structured interviews also resulted in the collection of multi-layered data. Specifically, 53 interviews were conducted in four countries. These interviews used

purposive sampling to include members in different levels (Gerring, 2007). Interviewees included national directors, middle managers and project managers operating in national offices and at the federative level. As FyA is an extremely large organisation, another researcher conducted 77 additional interviews. However, in all of the 130 interviews, the same questionnaire was used to avoid compromising the study's validity (Eisenhardt, 2011; Jarzabkowski et al., 2015). In comparison with the observations, interviews were relevant to glean information about actors' experiences and opinions. In this sense, interviews mitigated the conceptualisation of time "*as a chronology of episodic linear events that exist regardless of those experiencing them*" (Cunliffe et al., 2004, p. 261). Overall, interviews were relevant to explicate members' expectations about the future as well as to explore the sensemaking processes of diverse actors when dealing with poverty reduction in organisational contexts.

#### 1.3.5.3 Documents

Finally, I collected over 224 documents comprising 13.487 pages. These documents referred to FyA's strategy, history and operations in different countries. Archives offered a rich source of information about the emergence of FyA, its evolution and expansion in three continents. Documents were also relevant for grasping the changing manifestations of poverty over 60 years, moving from an economic phenomenon to an intertwined web of social, environmental and economic phenomena. Finally, documents were significant to deconstruct the problems associated with strategy making in the Federation and to follow the construction of a new way of proceeding. Overall, documents underpinned the historicization of events (Hernes, 2014) of FyA and poverty over the course of six decades.

Having varied data sources enriched the research in three ways. First, it allowed the triangulation of findings to confirm and validate accounts (Denzin, 1978). Thus, the emergence and changing manifestations poverty, as well as the strategic accounts of FyA, were set against biases of the participants and the researcher (Patton, 2002). Second, following a multi-data collection process allowed the construction of a more comprehensive and convincing narrative that led to a deeper understanding of the phenomenon (Gerring, 2007). Last, each data collection method compensated for the

weaknesses of the others. For example, ethnographic observations helped to overcome the problem of participants' biases when reconstructing accounts (Van Maanen, 2011).

### *1.3.6 Data Analysis: Inductive theory building*

The analysis undertaken was open-ended and inductive (Strauss and Corbin, 1998). In other words, the findings emerged from raw data without the constraints imposed by sequential thinking or hypothesis testing (Saunders, 2011). The primary aim of inductive analysis is the development of theory (Eisenhardt, 2011). This seems more suitable for the purpose of this study: that is, to understand the future in sensemaking, a topic that is relatively under-theorised (Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015). In the context of this study, the process of inductive analysis took place over different phases and used narrative analysis (chapter 3 and 4) as well as the Gioia methodology (Gioia et al., 2012) (chapters 4 and 5) to provide a theoretical contribution. As each paper discusses succinctly the analysis undertaken, we can also see three common processes.

First, there was an initial analysis in the fieldwork (Atkinson and Hammersley, 2007) when diaries and notes were analysed. This preliminary analysis served to reveal marked differences among members when referring to poverty, potential solutions and ways to deal with the future when thinking about alleviating poverty. Furthermore, notes were useful to recognise that metaphorical thinking was a significant ally in collective sensemaking processes within the organisation. The analysis of notes also facilitated the identification of key members in the strategic process and provided a reliable base for the preparation of a list of follow-up themes for subsequent meetings.

Second, I imported the data of the observations, interviews and documents into NVivo (V.11) to create an integrated database. As the number of pages in conjunction with audio files from strategic meetings was overwhelming, NVivo provided an indispensable tool to manage and access the data. NVivo was also useful for labelling and describing data in the different stages of the research, thus enabling me to separate information that referred to the strategic review, the history of FyA, national nodes concerns and problems as well as the differences among members in the organisation. In addition, NVivo was a relevant ally in the process of data analysis using the Gioia methodology (Gioia et al., 2012) and narrative analyses.

Third, following Gioia et al. (2012) principles of being transparent with inductive concepts while at the same time ensuring a scientific analysis, I adopted the notion of first order and second order analyses. By first order analysis, I mean to adhere faithfully to informants' words. The result of this analysis was 918 codes that seemed unwieldy at first. However, in subsequent analyses, I began to find similarities and grouped them under new codes. In a sense, this situation resembles Strauss and Corbin's (1998) method of axial coding. The number of codes were reduced dramatically, allowing an analysis of the situation experienced by FyA members. In this step, I also analysed narratives from the lens of classic (Riessman, 1993) and postmodern theories (Meretoja, 2018). In the case of classic narrative analysis, I focused on plots, characters and narrative forms, while in the case of postmodern narrative analysis; I concentrated on the context of meaning and its implications for action.

Fourth, second order analysis in practice occurs when the researcher moves from the empirical to the theoretical realm. Hence, during the analysis of data, I paid particular attention to the concepts that did not seem to have adequate theoretical referents in the existing literature (Gioia et al., 2012). Examples include the intertwining of expectations and narratives for chapter 4 and the role of metaphors in keeping the future open enough for acknowledging actors' discoveries or adjusting future action. Finally, the second order analyses were further distilled into second order "aggregate dimensions". These aggregate dimensions are significant in chapters 4 and 5. In chapter 4, this categorisation contributed to the development of theoretical grounds for the differences between the interlinking of expectations and narratives, whereas in chapter 5, it contributed in the construction of the model for prospective sensemaking.

### *1.3.7 Challenges and reflections during the methodological process*

I experienced two major challenges during the data collection and analysis processes. On the one hand, I sometimes struggled to maintain my neutrality. Back in 2016, when I travelled to South America, I had the idea that no matter what happened, I could be a totally objective outsider and keep the data and analysis far from subjective biases. However, the more I interacted with the members of the organisation, the more I felt like I belonged there. I could only overcome this problem by working collaboratively with my two supervisors during long and agitated feedback sessions. In this sense, peer reviewing

was crucial to gain validity while challenging the researchers' assumptions by asking relevant questions about methods and interpretations (Cresswell and Miller, 2000). On the other hand, I also faced ethical issues. When I started the data collection, I was not acutely aware of the various levels of poverty that exist in South America. The periphery of the city conceals many vices and problems that most people do not even know exist. Likewise, through the research, I realised that human deprivation only evolves but never stops. Therefore, I feel it is somewhat unfair for me to categorise places that already carry a massive burden. I would have preferred to omit the names of all locations. Nevertheless, in my attempt to create a bond between the actors and reader, I retained some of the actual names but only in contexts that would not further stigmatise the communities.

Reflecting on the process of data collection, I must acknowledge that being from Latin America, especially from Colombia, contributed to making me feel more passionate about my research. Not often does a researcher have the opportunity to study a complex social phenomenon with massive implications in which his analyses would be taken into account. I consider this outcome among the most significant aspects of my doctoral journey. Overall, my doctoral research could be of some practical benefit to the world outside academia, specifically to the world of NGOs trying to make a difference in the lives of those individuals suffering in extreme contexts. In general, I consider the work that FyA undertakes on a daily basis extremely challenging. While I strongly believe that education is a human right that should be in hands of the state, the reality is different. In this regard, I also consider that most organisational research published in top-tier academic journals has an obligation to help shed light on complex and serious social problems and those organisations aimed at addressing these problems. The world is becoming more accelerated, less certain and more inhumane, as technology has disrupted social practices. Thus, in order to remain as a valuable source for managers and management in general, we researchers need to abandon the comfort of the desk and get immersed in the mud. Fortunately, I have seen that some researchers (Ferraro et al., 2015; George et al., 2016; Reinecke and Ansari, 2016) have recently called for a better understanding of social issues.

## 1.4 Contributions

This study contributes to the literature of sensemaking, more narrowly to prospective sensemaking and the literature of wicked problems. By attempting to depart from Karl Weick's notion of sensemaking as a retrospective process, this thesis breaks new ground in our understanding of prospective sensemaking. However, in doing so, it potentially challenges core beliefs in sensemaking scholarship. While few scholars have called for such an approach that is more future-oriented (MacKay, 2009; Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015), research on the topic remains relatively scarce. Responding to such calls, this doctoral research contributes to prospective sensemaking in two ways.

First, there is an agreement that prospective sensemaking (Konlechner et al., 2018) refers to *"sensemaking processes where the attention and concern of people is primarily directed at events that may occur in the future"* (Rosness et al., 2016, p. 55). In this regard, prospective sensemaking can be more clearly understood by studying differences in meaning constructions of the images of the future. In the context of prospective sensemaking, images of the future are interwoven with individuals' practices, desires, hopes, fears and experiences. These images of the future are expressed through expectations, while practices, desires, hopes, fears and experiences are expressed through narratives forms. In this intertwinement, the future is narrated in dissimilar ways affecting actor's expectations. Paper 2 (Chapter 4 respectively) offers a comprehensive analysis of the matter. While linear and screenplay narratives form stable expectations, disjointed and non-linear narratives form volatile expectations, and cyclical narratives form contingent expectations. Crucial to the narrative accounts and the expectations about the future is the perceived agency of actors in the social world, as actors' volition is neither unfettered nor too fettered (Mische, 2009). This idea of agency aligns with previous sensemaking theorising that explains that some opportunities, changes and decisions will be more possible or impossible, depending on the position of individuals.

Second, I present a process explaining how organisational actors can make sense of the future collectively without restraining possibilities that have not yet come into being. I have termed this process as the future continuous. In contrast to current prospective sensemaking theorising that treats the future as equal to the past, the future continuous

treats the future as contingent and precarious. In addition, while future perfect thinking makes temporality linear and static, and marginalises voices (Boje, 2011; Dawson and Sykes, 2019), the process proposed in paper 3 (chapter 5 respectively) facilitates a vision of the future as a fluid and multi-authored construction in which alternative constructions of the past and future possibilities will enable multiple pathways (Sillince et al., 2012). Thus, the future continuous is relevant for situations where goals are unclear and rapidly changing. It is also relevant for complex environments where relying on past experiences is likely to lead to suffering from biases, cloud imagination through “hindsight” and lead to “*foresightful thinking flaws*” (Mackay & McKiernan, 2004: 75; Lord et al., 2015). Unlike the future perfect, the future continuous allows practices in terms of an endless exploration for direction and meaning, while acknowledging that human action is always directed simultaneously at the past, the present and the future (Emirbayer and Mische, 1998).

This research also contributes to the literature of wicked problems by unveiling the importance of distributed sensemaking and multi-authored responses to the problem. As previous research has found when dealing with wicked problems, it is necessary to engage with social processes and collective dynamics (Weber and Khademian, 2008). In these social processes, meaning is crucial to create a sense of binding to engage in action with the problem (Dorado and Ventresca, 2013; Reinecke and Ansari, 2016). Thus, paper 2 (chapter 4) offers insights about problems with composite narratives understood as “shared understandings” that do not necessarily translate into equivalent meanings for different actors. This problem is addressed in paper 3 (chapter 5), by illustrating the creation of equivalent meanings through multi-authored or polyphonic accounts. In contrast to composite accounts, through polyphonic constructions, actors can understand how they interrelate as a system to act towards “something”. This has implications in terms of organising and strategizing for wicked problems. On the one hand, it accounts for differences among individuals’ temporal orientations and interests in terms of planning responses for the problem. On the other hand, it allows co-generating meaning in which actors converge to have a sense of closure while diverging in action of their own ongoing circumstances.

## 1.5 Thesis structure

Based on a three-paper format, this research focuses on how Fe y Alegria's organisational actors made sense of the future for organising and responding to the wicked problem of poverty in a variety of contexts. The thesis is structured in the following way. In the chapter at hand, *Chapter 1*, I introduce the motivation of the research, provide a theoretical grounding, explain the relevance of the case, delimit the research questions and present the contributions of each paper. *Chapter 2* then offers a literature review of sensemaking, the overarching theme of the three studies of this research. In this chapter, sensemaking is discussed in terms of definitions, processes and the gaps that this research addresses.

Based on the identified gaps, *Chapter 3* contains the first paper of this thesis. This paper is problem-driven and outlines the empirical context of the research. The purpose of this paper is to introduce the wicked problem of poverty as well as illustrate how Fe y Alegria has managed to deal with the changing manifestations of poverty over 60 years. In general, the paper discusses what actors have done to respond to the wicked problem of poverty without exhausting resources while finding ways to organise in the social world. The main takeaways of this chapter are the importance of collective action and distributed experimentation through time. Specific findings related to the need to find ways to create small wins while learning and adapting to the context provide the foundation for chapter 4. In addition, findings around engaging in multilevel actions and creating participatory structures provide the grounds for chapter 5.

*Chapter 4* contains the second paper of the thesis. This paper builds theory inductively as it deals with a problem that I encountered in the fieldwork. In an organisation as diverse as FyA, different groups of actors (Jesuit priests, program managers, and lay directors) have vastly different sets of expectations about the future, which are challenging to align. As a consequence, in this paper, I delve into the role of expectations in strategy making when tackling wicked problems. As sensemaking of the future is mainly represented in expectations (Konlechner et al., 2018), I examine how actors form their expectations and how different expectations influence strategy making. To do so, I explore actors' sensemaking processes through narrative constructions and differences. The salient contribution of this chapter is a comprehensive explanation of prospective sensemaking,

followed by an explanation of the differences among actors when making sense of the future to create small wins. However, the paper also opens a conversation about a critical problem, namely, how diverse actors can engage in coordinated action without closing the future or marginalizing voices. This issue then serves as the second impetus for the final paper.

**Chapter 5** contains the third and final paper of this research, which is also a response to some of the questions that have been opened up by the previous two papers. Thus, in this paper, I bridge findings of chapters 3 and 4 (i.e., paper 1 and 2 respectively) and build theory inductively about the role of future-oriented sensemaking. Specifically, I explore how organisational actors of FyA bring together their different expectations about the future in order to create ways to deal with the future of poverty alleviation while maintaining enough room for the unexpected and acknowledging that expectations may vary. In doing so, I unveil the problems of the future perfect tense and demonstrate how the dialogic construction of metaphors helps overcome this problem. Put simply, it is about how constructions that include multiple and heterogeneous beliefs, values and rationalities in participation with others (Bakhtin, 1985) facilitate preserving the openness of the future without imposing a dominant voice. Finally, **Chapter 6** provides a general discussion while integrating extant theory and the findings of the three empirical papers. This chapter highlights the theoretical contributions of this thesis to the existing literature. In addition, it outlines some practical implications, limitations and future research avenues not discussed in the papers. Table 1.2 provides a summary of each paper of this thesis in terms of key themes and findings.

**Table 1.2 Summary of the papers of this thesis**

<b>Paper title</b>	<b>Key themes</b>	<b>Key Findings</b>
Chapter 3: “Managing the changing manifestations of poverty: the case of Fe y Alegria 1955-2017”	<p>This paper characterises poverty as a wicked problem while following its changing manifestations over a 60-year period.</p> <p>This paper also analyses the evolution of Fe y Alegria in Latin America and Africa</p>	<p>1) The analysis of the changing manifestations of poverty illustrates the importance of distributed experimentation, namely the need of creating small wins while learning and adapting to the context.</p> <p>2) By recognising the future as ever evolving, the case</p>

	<p>while revealing key organisational processes.</p>	<p>presents the significance of complementary responses and the need for thinking outside the box and using constraints to create opportunities when dealing with wicked problems.</p> <p>3) By emphasising the contested nature of wicked problems, the case highlights the relevance of engaging in multilevel actions and creating participatory structures to respond to the wicked problem.</p>
<p>Chapter 4: “Mapping expectations about the future in strategy making: alleviating poverty in a networked organisation”</p>	<p>This paper explores the role of expectations in bridging experience and the social world individually and collectively.</p> <p>In addition, this paper analyses the influence of expectations in strategy making processes.</p>	<p>1) Actors’ expectations differ in the way members present them in a story way (<i>narrative forms</i>), how events are sequentially linked (<i>narrative orientation</i>) and how much room for changing the future have (<i>future openness</i>).</p> <p>2) Composite narratives in strategy making do not translate in composite expectations.</p> <p>3) Temporal work may reduce the future into a plausible and coherent narrative however; composite narratives obscure and marginalise historical, cultural and relational experiences that guide actors’ visions of the future.</p>
<p>Chapter 5: “Moving the frontiers for wicked problems - the role of metaphors in prospective sensemaking”</p>	<p>This paper builds on the findings of the previous papers and shows the limitations of the future perfect tense when dealing with wicked problems.</p> <p>To do so, the paper examines how the diverse leadership of Fe y Alegria made sense of</p>	<p>1) This paper expands the temporal spectrum of sensemaking from the “future perfect” tense to conceptualising sensemaking in the “future continuous” tense. This provides a processual perspective (Sandberg and Tsoukas, 2015), explaining how actors make sense of the future as a perpetually evolving</p>

	<p>their organisation's future during a strategic review process, without imposing a dominant view or by conquering the future.</p>	<p>construction of what "will be happening.</p> <p>2) This paper offers a process model to explain how metaphors allow actors to conceive new realities and potentialities beyond what is already known.</p> <p>3) The model conceptualises the role of polyphony in future-oriented sensemaking. In this sense, the model shows that organisational actors do not necessarily have to agree on a dominant future to coordinate their actions. Using images that provide enough viability to be interpreted differently actors can imagine and project towards different versions of the future.</p>
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## Chapter 2 Literature Review

The core body of scholarly literature that this thesis engages with and seeks to contribute to is that of sensemaking, and more narrowly the notion of prospective sensemaking. Although there are several perspectives that may help to untangle the question of *how organisational actors deal with the future in contexts dominated by dynamic changes and contested views as in the case of wicked problems*, few are as relevant as sensemaking to examine the temporal and collective dynamics of organising and strategizing (Brown et al., 2015; Cornelissen and Schildt, 2015; Maitlis and Christianson, 2014). This is because sensemaking explains how individuals create and interpret meaning while enacting with ongoing social realities (Brown et al., 2015). These two components, meaning making and action in the social world, are crucial to understand the changing manifestations of wicked problems. Thus, the sensemaking perspective provides grounds to examine how individuals shape and are shaped by wicked problems dynamics.

The aim of this chapter, which is based on the theoretical relevance of sensemaking, is to provide a succinct review of this perspective. First, I provide the background of sensemaking and its definition in organisation studies. That is, I present a range of relevant definitions based on sensemaking's evolution during the last 50 years. This process is crucial to explain what I mean by "sensemaking" in this thesis. Second, I explain the triggers of sensemaking identified in the organisational literature. In this part, special attention is given to the topics that will be covered in the three papers of this thesis. Third, I explore the different sensemaking processes that have been theorised, such as creation, interpretation, and enactment (Weick, 1995). These processes provide the grounds for chapters 4 and 5. Fourth, I examine the outcomes of sensemaking, namely what sensemaking processes accomplish. I discuss in this section how the current dominant notion of sensemaking has influenced our understanding of the future and the transferability of sense. After conducting this review, I provide a short summary of the main theoretical points while showing their relevance to advancing research on wicked problems. Lastly, I discuss the two identified gaps in the literature that this thesis seeks to contribute: (1) the need to account for distributed processes of sensemaking when dealing with wicked problems, and (2) theorisation of different sensemaking processes for the future.

## 2.1 Background: The Sensemaking perspective

Sensemaking is a broad concept used in diverse fields such as psychology, sociology, management, and linguistics that broadly refers to individual and collective processes of interpretation and meaning construction to act in the world (see Dervin, 1998; Linell, 2009; Weick, 1995). However, for the purpose of this thesis, I will only review the concept of sensemaking and its related processes in the context of organisational studies.

In organisational studies (hereafter OS), sensemaking was originally developed by Karl Weick in 1969. In the book *The Social Psychology of Organizing*, Weick (1969) argues that changes in organisational environments create organisational discontinuity. Thus, when organisational actors notice discontinuity, they engage in a process of the selection and retention of cues to reduce equivocality before acting. Interestingly, in this book, Weick emphasised the need to study the underlying cognitive processes of selection and retention experienced by organisational actors.

However, despite Weick's initial formulation of sensemaking, the literature on the topic has become extremely fragmented and diverse (Maitlis and Christianson, 2014), not least because even Weick has shifted from having a strong cognitive perspective on sensemaking to one that is more socio-constructionist (Sandberg and Tsoukas, 2015). This diversity has several advantages, such as refining sensemaking processes, but it has also generated a diversion concerning what sensemaking encompasses. I explore next the history of sensemaking to provide elaboration on why the sensemaking literature is extremely diverse, which leads to significant variations in how it is studied (Sandberg and Tsoukas, 2015).

The 1960s and 1970s were extremely important for the foundations of sensemaking for two reasons. First, the treatise of Berger and Luckmann (1966) about the social construction of reality provided the grounds to defy the notion of an objective reality. By defying the notion of an ultimate objective reality, researchers started to study how individuals constructed what they perceive as reality and how those constructions influenced human action. The constructivist turn was particularly meaningful for sensemaking as it acknowledged that multiple realities could co-exist in the same context (Weick, 1969). Second, psychological researchers delved into individuals' conflicts

between experienced reality and conflicting expectations (Bugental et al., 1968; Manis, 1978; Weick, 1969). Findings of these studies contributed to sensemaking's foundation, specifically by unveiling why actors failed to reconcile experience with what was perceived as real based on cognitive processes (Maitlis and Christianson, 2014).

Sensemaking in the 1980s was greatly influenced by a cognitivist turn (Walsh, 1995). As a result, most of the sensemaking studies focused on topics such as how stimuli from the environment were noticed (Kiesler and Sproull, 1982) and on the identification and prioritisation of cues (Daft and Weick, 1984; Starbuck and Milliken, 1988). This strong cognitive orientation changed gradually during the 1990s with the linguistic turn (Maitlis and Christianson, 2014). The change resulted in the research on sensemaking gaining depth and breadth. Among the most important developments in sensemaking was the seminal book of Weick (1995), *Sensemaking in Organisations*. In this book, Weick provided a summary as well as a framework for understanding sensemaking processes. Equally important to Weick's contribution, sensemaking studies started to unveil the role of language and its influence in social processes (Gioia and Chittipeddi, 1991; Gioia and Thomas, 1996).

Lastly, the new century has been a prolific space for sensemaking studies. Sensemaking studies have become more diverse, addressing issues such as discursive practices (Balogun and Johnson, 2004, 2005; Rouleau and Balogun, 2011) and the construction and assimilation of narratives in organisations (Brown, 2006; Colville et al., 2012; Currie and Brown, 2003). Scholars have also shifted their attention to temporal processes that organisational actors experience (Gephart et al., 2011; Kaplan and Orlikowski, 2013; Patriotta and Gruber, 2015; Stigliani and Ravasi, 2012) and the role of metaphors in sensemaking processes (Cornelissen et al., 2008; Patriotta and Brown, 2011).

After reviewing the milestones of the last few decades of sensemaking research, there is enough evidence to argue that the sensemaking literature is far from homogenous (Brown et al., 2015); most of the studies are grounded on different ontological and epistemological perspectives (Maitlis and Christianson, 2014). This perceived diversity poses three challenges for scholars aiming to contribute to sensemaking. First, it is frequently assumed that when referring to sensemaking studies describe it similarly. This is not the case as sensemaking definitions privilege either, first, individual processes or

collective interactions or, second cognitive or discursive constructions. I expand on those differences in section 2.1.1 and clarify what I mean by sensemaking in the papers of this thesis. By establishing what sensemaking is for the purpose of this research, I pretend to reduce ambiguity while providing solid grounds for the claims that each paper raises. Second, most of the non-cognitive literature concerning sensemaking privileges the notion of a “shared understanding” that allows organisational actors to restore sense or to create desired future states. I examine issues around power and individual differences influencing the construction of “shared understandings” that guide future action and its implications for wicked problems in section 2.6.1. Finally, it has been assumed that sensemaking only occurs through retrospection, and this notion has influenced how the future is perceived, namely as if the future has already happened. I explore the problems with assuming that the future is over when analysing wicked problems in section 2.6.2.

### *2.1.1 Definitions of sensemaking*

There is no single agreed definition of “sensemaking” (Brown et al., 2015) and this is partially explained by the breadth and depth of the literature on the topic (Maitlis and Christianson, 2014). However, the definitions of sensemaking can be divided into two groups. One group classifies sensemaking depending on whether it occurs between or within individuals. In other words, according to whether sensemaking is a purely individual process or a collective process (Brown et al., 2015; Maitlis and Christianson, 2014). The other group classifies sensemaking according to whether it takes place as a cognitive or as a communication process. It is important to clarify that either individually or collectively, organisational actors make sense of a social world, but the difference is in how meaning is ascribed. Table 2.1 presents different sensemaking definitions and highlights authors’ focus on individual or collective levels and/or cognitive or communication notions.

**Table 2.1 Sensemaking definitions in Organisational Studies**

<b>STUDY</b>	<b>DEFINITION</b>	<b>PROCESSES MAINLY HAPPENING AT / LEVEL</b>	<b>FOCUS OF SENSEMAKING</b>
Starbuck and Milliken, (1988)	“Sensemaking has many distinct aspects—comprehending, understanding, explaining, attributing, extrapolating, and predicting, at least [...] What is common to these processes is that they involve placing stimuli into frameworks (or schemata) that make sense of the stimuli” (Goleman, 1985) (p. 51)	Individual	Cognition
Gephart (1993)	“Sensemaking has been defined as the discursive process of constructing and interpreting the social world” (p. 1485)	-	Communication
Weick (1993)	Sensemaking may be defined as an ongoing accomplishment through which an individual creates his situations and acts in an attempt to make him rationally accountable	Individual	-
Thomas et al., (1993)	Sensemaking is “the reciprocal interaction of information seeking, meaning ascription, and action” (p. 240)	-	Cognition
Weick (1995)	“Sensemaking is understood as a process that is (1) grounded in identity construction, (2) retrospective, (3) enactive of sensible environments, (4) social, (5) ongoing, (6) focused on and by extracted cues, (7) driven by plausibility rather than accuracy” (p. 17)	Individual	-
Bogner and Barr (2000)	Sensemaking is viewed as a conscious act of rethinking abstract representations that are developed through experience, which shape future responses	Individual	Cognition

Taylor and Van Every (1999)	“[S]ensemaking has been defined as a way station on the road to a consensually constructed and coordinated system of action” (p. 275)	Collective	Communication
Balogun and Johnson (2004)	“Sensemaking is a conversational and narrative process through which people create and maintain an intersubjective world” (p. 254)	Collective	Communication
Weick et al., (2005)	“Sensemaking unfolds as a sequence in which people concerned with identity in the social context of other actors engage in ongoing circumstances from which they extract cues and make plausible sense retrospectively, while enacting more or less into those ongoing circumstances” (p. 409)	Collective	-
Gephart et al. (2011)	“Sensemaking is an ongoing process that creates an intersubjective sense of shared meanings through conversations and non-verbal behaviour in face-to-face settings where people seek to produce, negotiate, and sustain a shared sense of meaning” (pp. 284-285)	Collective	-
Maitlis and Christianson, (2014)	Sensemaking is “a process, prompted by violated expectations, that involves attending to and bracketing cues in the environment, creating intersubjective meaning through cycles of interpretation and action, and thereby enacting a more ordered environment from which further cues can be drawn” (p. 67)	Collective	-

Although the presented sensemaking definitions vary significantly, two features are common to most of them. First, sensemaking is a process. During this process, cues are extracted (Weick et al., 2005, p. 409) and meaning is created (Maitlis and Christianson, 2014, p.67) while individuals enact the world (Taylor and Van Every, 1999). Second, sensemaking is about the construction of meaning to act in the social world. Most of the definitions focus on the importance of having accounts that enable action (See Bogner and Barr, 2000; Maitlis and Christianson, 2014; Taylor and Van Every, 1999; Thomas et al., 1993; Weick et al., 2005). Thus, based on the previous two features, this thesis approaches sensemaking as meaning the following:

*The process in which organisational actors, individually or collectively, create and interpret meaning to project action and enact the ongoing social world.*

## **2.2 Triggers of sensemaking**

The sensemaking literature has identified that organisational actors, when confronted with ambiguous events and/or meanings (Weick, 1995; Weick et al., 2005) or discrepancies between expectations and reality (Maitlis and Christianson, 2014), seek to recover sense by ascribing subjective meaning to past events. Current reviews of sensemaking (Brown et al., 2015; Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015) have identified that ambiguity and discrepancies may be triggered by external and internal events. Among the ones that inform this thesis are identity threats, environmental changes, and planned events.

### *2.2.1 Identity threats*

The impossibility of confirming one's self (Weick, 1995) or the identity of an organisation acts as a trigger of sensemaking (Maitlis and Christianson, 2014). This thesis has been the starting point for several sensemaking studies in the last decade. For instance, at the individual level, Maitlis's (2009) study of professional musicians who experienced severe injuries found that not being able to play or perform triggered the need to recover a sense of who they were and how others saw them. In another line of research, Pratt et al. (2006) found that discrepancies between new identities and past experiences triggered sensemaking processes to cope with the perceived reality. At the organisational level, Dutton and Dukerich's (1991) analysis of the deterioration of Port Authority's image

found that sensemaking was triggered by questions surrounding what type of organisation the Port was and how the Port wanted to be. Similarly, Ravasi and Schultz's (2006) study of Bang and Olufsen over a period of 25 years found that sensemaking was triggered three times by the need of organisational actors to understand who they thought they were and who they really wanted to be.

### 2.2.2 *Environmental changes*

Environmental changes create disruption in organisational activities and trigger sensemaking efforts to recover sense (Sandberg and Tsoukas, 2015). Current literature divides these changes into major (e.g. crises and disasters) and minor (e.g. changes in legislation and technological advancements) changes (Maitlis and Christianson, 2014). Major environmental changes have been studied in cases such as the Mann Gulch (Weick, 1993b), the Bhopal (Weick, 1988) and the Columbia shuttle (Dunbar and Garud, 2009) disasters. For example, regarding the Mann Gulch disaster, Weick (1993b) argues that sensemaking was triggered by discrepancies about firefighters' beliefs and reality. The fire that was expected never existed and firefighters were not prepared to handle the situation. Similarly, in the Columbia shuttle disaster, a series of unexpected technical failures triggered sensemaking about what was going on (Dunbar and Garud, 2009). What is common to these studies is that sensemaking was triggered by actors' violated expectations and the need to understand what was going on or why events did not occur as planned.

Environmental changes can also be minor events such as changes in legislation, technological glitches, misunderstandings about what to do in specific events, or challenges to routines (Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015). Minor environmental changes have a more diffuse impact and less catastrophic outcomes than disasters and tragedies. For instance, Patriotta and Gruber's (2015) study of news making illustrates how workers in a news department plan stories on a daily basis and how, when something unexpected occurs, they adjust the original plan to cover the new story. Relatedly, Milliken's (1990) study of university administrators shows how a change in student population demographics over the years triggers sensemaking efforts. Overall, the major contribution of studies about environmental changes is that violations of expectancy frameworks (what people expect to happen) trigger sensemaking.

### 2.2.3 *Planned events*

Not surprisingly, the vast majority of sensemaking studies have focused attention on strategic change and strategy making as triggers of sensemaking. Maitlis and Christianson (2014) explain that these types of interventions unveil challenges to organisational meanings and violated expectations about what should have happened. For instance, Gioia et al. 's (1994) study of one strategic change initiative shows that sensemaking is triggered by implicit and explicit attempts to develop a consensual redefinition of a social reality. Balogun et al.'s (2015) research on senior management teams illustrates how the changing roles of senior managers triggers sensemaking efforts. By being part of the team that construct and at the same time are recipients of change, senior managers draw on different narratives to make sense of what is going on. A final example in the case of planned change initiatives is provided by Konlechner et al. (2018). In their study of planned change in two hospital units, sensemaking is triggered by violations of people's expectations about change trajectories. Having an expected trajectory that unfolds differently or that does not achieve the expected results prompts the need to analyse why it failed.

In the context of strategy making, Kaplan and Orlikowski (2013) illustrate how struggles with competing interpretations of the past, the present, and the future at the organisational level triggered efforts to resolve differences. In this case, deliberation among actors was needed to reach a strategic account that recovered organisational sense and guided future action. In a related subject area, Stigliani and Ravasi (2012) describe how designing understood as an open-ended activity triggers sensemaking efforts at the individual and collective level. In this case, as "*things are not defined at all*", (p. 1235), organisational actors engaged in three cycles of retrospection to make sense of the final product.

### 2.2.4 *Limitations of studies about triggers of sensemaking*

The previous mentioned triggers of sensemaking in organisations are relevant for this thesis in two ways. On the one hand, they provide theoretical grounds to understand which specific processes may trigger sensemaking efforts regarding wicked problems. Such processes are strategic plans that relate to the future and identity threats that are a result of the changing nature of wicked problems. On the other hand, these triggers explore

problems concerning environmental changes and how organisational actors deal with expectancy frameworks and failure.

However, these triggers also raise two problems when analysing wicked problems. First, in terms of temporality, the analysis of triggers based on episodic events will always be reduced to retrospection. This is explained by the fact that interruptions or violations of expectations occur in the present and only relate to the past (MacKay, 2009). This retrospective notion also applies to making sense of the future, as in the case of planned events. Here, Weick (1969) argues that a sense of the future can be only retrieved by thinking about a future that has already transpired, namely thinking in the future perfect tense. Thus, this retrospective notion tends to diminish a world of opportunities that have not yet been formed or have not yet been encountered that relate specifically to the future (Joas, 1996). Moreover, it denies a sense of what has not yet been discovered (Emirbayer and Mische, 1998), and what is continuously evolving (Elkjaer and Simpson, 2011), which are crucial to understanding wicked problems' contexts.

Second, in terms of the meaning of sense, a strong focus on episodic events triggering sensemaking raises questions about what happens when sense is not under attack (Sandberg and Tsoukas, 2015). According to Sandberg and Tsoukas (2015, p. S25), sensemaking is not only about disruption but also about "*a mode of engagement whereby actors are immersed in practice without being aware of their involvement*". In this sense, sensemaking is not triggered by a disruption but, on the contrary, it occurs simultaneously when actors respond to a specific situation as it unfolds. This is particularly important to respond to the changing nature of wicked problems. Hence, sensemaking does not necessarily need to be expressed to be meaningful.

### **2.3 Processes**

Weick (1995) notes that sensemaking departs from the idea that "*actions are known only when they have been completed, which means that we are always a little bit behind or our actions are always a little bit ahead of us*" (Weick, 1995, p. 26). To explain how sensemaking occurs, Weick (1995) defines three interrelated processes. First, "*creation*" comprises the selection and bracketing of cues. Second, "*interpretation*" describes how the identified cues are linked to frames of reference based on past experiences. Finally,

“*enactment*” explains the process of acting that clarifies and shapes what is going on. I expand on these processes and their importance for this thesis in the following sections.

### 2.3.1 *Creation*

According to Brown et al. (2015), sensemaking starts with the experience of multiple meanings that cannot be easily merged, which generates confusion. This confusion, known in sensemaking studies as “equivocality” (Putnam and Sorenson, 1982) interrupts situations, organisational events, and the flow of experience (Weick, 1995). Thus, in an effort to deal with equivocality, organisational actors start questioning what happened, what it means for others, and how meaning can be initially reconstructed. During this process, actors select, extract, and bracket cues (i.e. present moments of experience) from the environment to create an initial sense (Weick, 1995).

What is interesting about the process of creation is that most of the literature that explains it succinctly has strong socio-cognitive grounds. For example, Kiesler and Sproull (1982) unveiled that organisational adaptation starts by actors noticing stimuli from the environment. After noticing stimuli, actors can move to interpret what has happened. Similarly, Daft and Weick (1984) argue that before interpreting, actors need to scan or monitor the environment to collect data. Only when data has been collected can actors give meaning to cues by constructing cognitive maps. These arguments resonate with Starbuck and Milliken's (1988) claim of classifying stimuli before placing them into any framework for further interpretation.

Overall, the previous studies reveal the retrospective nature of “*creation*” (Weick, 1995; Weick et al., 2005), which has two implications for research in sensemaking. First, the creation of meaning is an attentional process in which actors direct attention to what they believe has happened. Here, Weick et al. (2005) clarify that interruptions or equivocal events are partly of individuals’ own making and not simply reactions to objects. Second, selecting, bracketing, and extracting cues is a process that is highly influenced by actors’ values, priorities, knowledge, and preferences. Thus, in order to explain what has occurred, actors will always select and bracket cues through the lens of the present (Elkjaer and Simpson, 2011). In other words, as the interruption has already happened, any changes in present circumstances will affect how initial meaning is created.

### 2.3.2 Interpretation

The concept of interpretation in sensemaking implies that people do not discover but “*generate what they interpret*” (Weick, 1995, p. 13). Generating what they interpret involves moving from an initial sense of the creation stage to developing a more nuanced and organised construction about what interrupted the event (Sandberg and Tsoukas, 2015). This organised construction is possible by translating cues into models of understanding, which in turn is what brings meaning out (Daft and Weick, 1984).

In contrast with the process of creation, studies that explain concisely the process of interpretation focus on stories and narratives. According to Brown et al. (2008), stories are powerful devices for the interpretation of meaning as they are embedded in actors’ realities and experiences. In addition, the process of narration allows a move from authoring to co-authoring, which constructs richer interpretations of the past, the present, and the desired futures (Brown and Humphreys, 2002). These insights have been relevant in sensemaking studies as follows. For example, Abolafia’s (2010) study about the narrative constructions of the Federal Reserve illustrates how members negotiate meaning to create an operative model that provides certainty and sustains action over time. Drawing on the introduction of a series of interventions in the NHS (National Health Service) in the UK, Currie and Brown (2003) explain how narratives enable collective sensemaking and multiple understandings about what has happened and what is happening. Finally, using a narratology approach, Boudes and Laroche (2009) demonstrate the role of narrative choices in organising and mapping interpretations of what happened and to what extent it was foreseeable.

The previous studies support Weick’s (1995, p. 34) argument that “*people create their environments as those environments create them*”. However, a recent critique of sensemaking by Sandberg and Tsoukas (2015, p.S22) unveiled that “*a large majority of sensemaking studies seem to have mainly investigated the interpretation process in sensemaking, rather than focusing on all three distinct sensemaking processes (creation, interpretation, and enactment)*”. This is problematic as sensemaking tends to be reduced to the interpretation of past events rather than seen as a systematic process in which actors create and interpret meaning while acting in the ongoing world.

### 2.3.3 *Enactment*

According to Sandberg and Tsoukas (2015), enactment involves acting with a generated and interpreted meaning of the interrupted situation while seeing if meaning restores the interrupted activity. This understanding of enactment has two important implications. First, the meaning generated and interpreted becomes something that guides actions and orientations in the social world (Weick, 1995). Put differently, what actors make sense of, and how they do it, create specific ways of acting in the social world. For instance, Wiebe's (2010) study about time and organisational change illustrates how managers' enactment is influenced by the way they configure relationships between the past, the present, and the future. While some managers' enactments privilege some frames of continuity based on sameness, others privilege discontinuity based on provisional goals or a past that is nostalgised. Second, enactment is about acting in the world and not about how people represent the world. In this sense, Weick (1995) argues that enactment creates cues rather than responding to a pre-given world. Thus, the notion of enactment creates an ontological oscillation, where there are subjective interpretations that have become objectified by the means of behaviour (Porac et al., 1989).

The role of action in sensemaking has been particularly relevant to explain issues regarding agency in the social world. For instance, drawing on Bourdieu's theory of practice, Lockett et al. (2014) found that when making sense of change, actors' enactment varied significantly. For example, elite actors (e.g. managers and consultants) showed greater agency than nurses, who were more conservative and aligned to existing organisational schemata. Similarly, LaPorte and Consolini's (1991) analysis of highly reliable organisations describes how actions needed to respond to crises shape and are shaped by how much agency actors have. Looking closely at agency may provide new insights, not only for understanding how actors enact the world but also for refining how actors respond to wicked problems. This is particularly relevant as sensemaking is highly contextual and practices shape and are shaped in the contexts in which they occur (Sandberg and Tsoukas, 2015).

## 2.4 Outcomes

Weick (1995) argues that sensemaking is about plausibility rather than accuracy. Plausible reasoning, in contrast with logical–deductive processes, is characterised by the absence of ultimate truths (Weick, 1995). Thus, the main outcome of sensemaking is creating, interpreting, and enacting a plausible account that explains what happened or what will have happened. Having a plausible account as the main outcome of sensemaking is crucial, as individuals’ experience of the social world is characterised by order, interruption, and sense recovery that creates new order (Weick, 2009). Temporally speaking, there are two implications that emerge from understanding the outcomes of sensemaking only in terms of plausible accounts that restore sense.

### *2.4.1 On sense that is episodic and its influence on our understanding of the past and the future*

One of the most significant critiques of sensemaking is that it confines meaning to something that is restored after an interruption (Sandberg and Tsoukas, 2015). Weick (1995, p. 26) defends his position by arguing that “*actions are known only when they have been completed*”. This understanding of lived experience gives special attention to the temporal relation between the past and the present. Put simply, sensemaking is past oriented and episodically structured because individuals can only make sense of something that has happened.

This notion has influenced the perception of the future, diminishing it to a derivative form of retrospection (MacKay, 2009). In this sense, Weick (1969) strongly emphasises that even when making sense of the future, individuals can only do this by thinking that it is an event that has already transpired, as expressed by the term “*future perfect thinking*”. Remarkably (Weick, 1969), contends that although plans relating to the future have not yet occurred, these plans only become meaningful after meaning is discovered. Overall, this episodic nature of sensemaking privileges the notion of presence and closure, overlooking the concepts of absence and openness (Holt and Cornelissen, 2014).

Consequently, an understanding of sense that is episodic and privileges closure translates to lived experience as order, interruption, sense recovery, and new order. Overall, this limits our comprehension of how organisational actors deal with the future when

responding to wicked problems for two reasons. On the one hand, wicked problems do not have an ultimate solution, and this challenges the notion of closure or accounts that have to be discovered to be meaningful. On the other hand, in contrast with episodic events, wicked problems are the result of complex webs of evolving events. Thus, this reduction of the future to retrospection and closure obscures the understanding of the “practices and the production of social reality” which “are ongoing and continually enacted” (Gephart et al., 2011, p. 281).

#### *2.4.2 On sense that is given or transferred and its influence on our understanding of the future*

The extant literature has unveiled that the outcome of sensemaking processes can be given to others (Sandberg and Tsoukas, 2015). This transference of sense via attempts to influence the meaning making of others is known as sensegiving (Gioia and Chittipeddi, 1991). Sensegiving has two specific implications for our understanding of the future. First, conceptualising sense as transferable reveals that it is possible to provide a particular orientation regarding where to go via desired futures. Gioia and Chittipeddi (1991) illustrate how this can be done by examining strategic change in one university. During this strategic change, the president of the university quickly involved personnel from top levels to promote his vision. By clearly stating his vision, the president attempted to provide a viable interpretation about where to go while guiding different stakeholders. Second, conceptualising the outcomes of sensemaking processes as transferable reveals that understandings about what has happened or what will have happened can be imposed. In other words, powerful actors can purposively guide and exclude dissonant voices during sensemaking processes (Allard-Poesi, 2005). This problem has been acknowledged in current reviews (Brown et al., 2015; Maitlis and Christianson, 2014), which have called for a better understanding of politics and power in sensemaking. Overall, outcomes that can be transferred only reproduce the notion of a conquerable future that is conquered by top players. This is problematic in wicked problems as processes of meaning construction for defining the problem and finding solutions are extremely contested.

## 2.5 On complex problems: Grand challenges and wicked problems

Management literature has recently started to research complex social and environmental problems (See Grint, 2010, Ferlie et al., 2011; Ferlie et al., 2013; Ferraro et al., 2015; George et al., 2016; Reinecke and Ansari, 2016). Theoretically, these complex problems have been addressed under the notions of grand challenges and wicked problems. Although, both notions refer to issues that are beyond one organisation agency there are some differences, which need to be acknowledged. In order to discuss complex problems, I will first define both notions. Then, I will explain the current work that has been conducted on the topic elaborating on relevant learnings that can be of use in the case of this thesis.

The notion of grand challenges was initially introduced in the management literature by George in 2011. George et al. (2016 p.1880) define grand challenges as “*formulations of global problems that can be plausibly addressed through coordinated and collaborative effort*”. While the notion of wicked problem was originally introduced in the planning literature by Rittel and Webber in 1973. A wicked problem refers to problems that are ill-defined, may not have a final solution and rely upon political judgement for any type of response (Rittel and Weber, 1973). In contrast with grand challenges, wicked problems have ten identifiable dimensions. According to Rittel and Weber (1973) these dimensions are: (i) there is no definitive formulation of the problem. This means that information will be always incomplete and that the understanding of the problem will be always affected by ideas about how to solve it. (ii) A wicked problem has no stopping rule. In other words, as a wicked problem is an open system there is no objective criteria that can tell when a final solution has been found. (iii) Solutions to wicked problems are neither true nor false. As stated in point (ii) the lack of objective criteria makes that actors use subjective analyses to define if the responses are good enough to tackle the problem. (iv) There is no immediate solution for a wicked problem. Even if different responses are deployed simultaneously it will be practically impossible to define if the solutions are generating the expected consequences. (v) Every solution to a wicked problem is one operation that cannot allow trial and errors. (vi) A wicked problem does not usually have a set of potential responses. (vii) Every wicked problem is unique. (viii) Every wicked problem can be considered a symptom of other problem. (ix) Wicked problems can be explained and represented un numerous ways. (x) The planner has no right to be wrong.

Based on the definitions of both notions this thesis prefers the one of wicked problems. This is mainly explained by the facts that wicked problems are better defined under ten identifiable dimensions and that according to George et al. (2016) grand challenges can be plausibly addressed. It is my contention that social problems such as poverty, global hunger and human trafficking are not solvable even if coordinated action and collaboration occur.

Research on complex problems is far from homogenous and has addressed multiple issues at theoretical and empirical levels. In the case of grand challenges, Ferraro et al. (2015) proposed theoretically a model of robust action to tackle these problems. In their model, they focus on the importance of participation, opening room for multiple actors and the design of responses based on distributed experimentation. Similarly, based on a critical review of the literature on grand challenges George et al. (2016) proposed a framework for addressing these challenges. The framework complements Ferraro et al. (2015) model by introducing notions such as societal barriers, actors needs and expectations, and organisational constraints.

At the empirical level, Dorado (2013) analysed the emergence of small commercial microfinance organisations in Bolivia. The main contribution of this paper for this thesis is that it offers a new view about how actors can be motivated to engage in action while at the same time explains group opportunity identification. Another important empirical paper is Wright and Nyberg's (2017) study of aspirations to tackle climate change. In this research they showed that starting with bold aspiration may be counter-productive to tackle the problem in the long run. Finally, Olsen et al.'s (2016) study of involvement of advocacy of groups while searching solutions not only legitimises the solution but provide a deeper understating of the problem.

There are also multiple learnings from the side of the wicked problems research. At the theoretical level, Grint (2010) extends Rittel and Weber (1973) original idea by introducing the importance of asking "right" questions. In Grint's (2010) view the starting point of dealing with wicked problems is moving away from a solution-model to a problem-based model. This is explained by the fact that solutions are not evident and by thinking only about solutions several aspects of the problem can be neglected. Similarly, Peters (2017) conceptual analysis of wicked problems pointed the need to account for

complex solutions that can overcome linear thinking based on the concept of multidimensionality.

At the empirical level, Reinecke and Ansari (2016, p.299) study of the case of the “conflict minerals” in the Democratic Republic of Congo, explain “*how responsibility can be attributed to a target by framing an issue and its root cause in ways that allow such an attribution, and how the attribution can diffuse and solidify*”. In addition, the work of Weber and Khademian (2008), and Ferlie et al. (2011) elucidate the importance of networks in addressing wicked problems. In this sense networks are relevant for governing shared resources, creating learning opportunities and providing links of complementarity among members. In addition, Ferlie et al. (2013) go beyond to explain how networks can be governable, this means evaluating their advantages and limitations. Drawing upon a historical analysis of the National Health Service of England (NHS) of the period “New Labour political control 1997-2010”, they found that governing networks requires stimulating inter-organisational learning while at the same time using cross-organisational communication technologies. These are not easy tasks as they require massive resources, change in actors’ behaviours and constant organisational adaptation. In addition, they found that networks, which have strong boundaries between actors can block cooperation. In this sense, when networks have less defined boundaries actors can overcome problems relate to hierarchy and advance on experimental responses.

Overall, the previous research on grand challenges and wicked problems is relevant to point issues around the importance of including multiple actors, finding ways to align them in action and moving from solution-based models to problem-based ones.

## **2.6 Summary of the literature review and grounds to wicked problems**

To summarise, first I introduced the concept of sensemaking. This led me to identify two streams in the literature: the cognitive and the communicative, which overlap but at the same time create some theoretical tensions. However, defining sensemaking is crucial to highlight a starting point for researching wicked problems. This is because when dealing with wicked problems, individuals would need to select cues from the environment and interpret meaning to project action while enacting the social world. After providing a

definition, I have analysed what triggers sensemaking. In this section, I discussed issues around identity threats, planned events, and environmental changes. These triggers are relevant to ground an examination of how the changing manifestations of wicked problems and planning future responses might trigger sensemaking efforts.

Consequently, the analysis of the triggers led me to examine the three processes that comprise sensemaking: creation, interpretation, and enactment. In the case of creation, selecting cues from the environment may be crucial to explain which information is selected and which is disregarded when analysing wicked problems. In the case of interpretation, the literature has pointed to the importance of understanding how actors narratively construct meaning by linking temporal and collective experiences. Remarkably, the interpretation of meaning is crucial to understand how actors engage with the wicked problem. Lastly, the exploration of enactment highlights the role of agency in the social world. This is crucial to understand how actors enact wicked problems as their volition is neither unfettered nor too fettered (Emirbayer and Mische, 1998; Mische, 2009).

Accordingly, I have explored what the outcomes of sensemaking are. In this section, I have pointed out how the existing literature privileges the notion of sense as something that is grounded on order and closure. This is problematic when thinking about futures that are contested or where uncertainty and dynamic changes are the common rule, such as in relation to wicked problems. In addition, I have examined the notion of sense as something that can be given or transferred to another person. Then, I have included the notion of complex problems. This notion raises questions about situations in which actors cannot frame or control a desired outcome as in the case of collateral effects of solutions for wicked problems. Overall, theoretically, the outcome of sensemaking reduces the future to retrospection. This conception is problematic as it tends to diminish a world of opportunities that have not yet been formed or have not yet been encountered that relate specifically to the future.

## **2.7 Gaps and problems**

Hence, drawing on the sensemaking literature discussed before and the challenges of wicked problems, I present the two interrelated gaps that this thesis seeks to address. First,

as the sensemaking literature has not accounted for power dynamics, little attention has been given to how individuals engage in processes of distributed sensemaking in order to enact ongoing realities (Maitlis and Christianson, 2014; Weick et al., 2005). Second, as sensemaking is conceived as a retrospective process, the study of the future has received little attention (Maitlis and Christianson, 2014). Both shortcomings are particularly relevant and, arguably, are aggravated in the context of wicked problems where sensemaking efforts (a) involve several actors with heterogeneous and asymmetrical positions, and (b) where retrospection is not available as a plausible guide for making sense of the future. These two gaps or problems are particularly relevant to improve our understanding of *how organisational actors deal with the future in contexts dominated by dynamic changes and contested views as in the case of wicked problems*. I expand on both points in the following sections.

### *2.7.1 Sensemaking as a distributed process when dealing with wicked problems*

Distributed sensemaking is understood as the possibility that different actors develop equivalent meanings to enable collective action (Weick et al., 2005). Weick et al. (2005) explain that distributed sensemaking is not about “consensus” or “shared understandings” of the issue as it explains how individuals who hold different pieces of information can construct meaning to act collectively. In this regard, Maitlis and Christianson (2014) elaborate by explaining that equivalent meanings are about what diverse people do independently and how the perception of these actions are reconciled so that discrepancies and ambiguities in outlook do not persist. However, as presented previously, sensemaking has mainly focused on either individual processes or collective processes where specific actors give or literally transfer sense to others in organisations (Cornelissen and Schildt, 2015). In these studies, the transference of sense involves (i) giving a particular orientation about where to go using desired images; and (ii) giving a preferred version of what happened or what will have happened that excludes dissonant voices. Thus, in general terms, less is known about how actors engage in processes of constructing equivalent meanings when information is fragmented among numerous parties (Maitlis and Christianson, 2014; Weick et al., 2005) and when actors hold asymmetrical positions (Allard-Poesi, 2005; Brown et al., 2015) such as in the case of wicked problems.

Among the few studies that have delved into distributed sensemaking processes, there are significant contributions that help narrow the gap this research aims to contribute. For instance, Weick's (2005) study of the Centres for Disease Control's diagnosis of the West Nile virus explains how a non-routine problem became a major social challenge involving multiple actors. In this study, Weick's analysis illustrates how by working in isolation, the diverse actors involved only processed some available cues leading to the dispersion of knowledge. In addition, as the Centres for Disease Control did not function as an integrator of knowledge, the understandings of the problem remained largely underdeveloped. In contrast to Weick's (2005) analysis, Wachtendorf and Kendra's (2006) study of the waterborne evacuation of Lower Manhattan on 9/11 shows that distributed sensemaking is possible during crises. A key finding of this study is that distributed sensemaking occurs when individuals' independent efforts align to identify capabilities, limits, and needs. In this way, individuals construct meanings that account for difference while aggregating elements needed for action.

In this sense, these two studies point to a crucial argument that should be used in future research aiming to explain distributed processes of sensemaking. For any situation in which sensemaking emerges, there are numerous ways of creating what is plausible depending on the levels of description and the modes of engaging with the social world (Weick, 1993a). This means that different actors will necessarily differ regarding their sensemaking processes as the information available is always incomplete and cues will not be identified and interpreted similarly. Thus, in paper one I explore how organisational actors respond to poverty as a wicked problem that never ends. This is particularly relevant to exploring how diverse actors in different locations with incomplete information about the problem create and enact responses to alleviate poverty over time without exhausting resources.

In addition, previous studies of distributed sensemaking processes have pointed out the importance of similar backgrounds and/or complementary identities for developing equivalent meanings. For example, Wachtendorf and Kendra's (2006) study of the waterborne evacuation shows that different actors responding to the problem, such as boat operators and the Coast Guard, had complementary identities. These complementary identities resulted from previous interactions, state regulations, and socially accepted

maritime norms. As such, actors shared a pre-existing knowledge that served to anticipate how others would react. Thus, collective action was possible due to the purposive anticipation of each other's reactions. Similarly, Stigliani and Ravasi (2012) illustrate how distributed sensemaking enabled design processes when actors shared similar backgrounds (i.e. designers). In this case, the team of designers organised cues in ways that meant they could reach multiple tentative interpretations. As a result, designers could produce new mental models that, through cycles of retrospection, responded to users' needs and requirements (Stigliani and Ravasi, 2012).

However, in the context of wicked problems, researchers are less likely to encounter such a degree of similarity or complementary identities. As research on wicked problems (Brook et al., 2016; Dentoni et al., 2018; Reinecke and Ansari, 2016) has shown, most actors hold heterogeneous beliefs, which complicates the definition of and response to these problems. Thus, research aiming to delve into distributed sensemaking processes needs to account for how actors deal with contradictory cues, representations, and interpretations without creating crossroads (Allard-Poesi, 2005). This means explaining how co-generative meaning emerges and how multiple actors can engage in action as a part of a coherent system. In this sense, special attention needs to be paid to the inclusion of different actors in the construction of multiple plausible accounts that allow coordinated action (Brown et al., 2015; Maitlis and Christianson, 2014). Because of this gap, in paper three I draw on the role of metaphors to explain collaborative processes of meaning construction that take place while the convergence, divergence, and coordination of different actors takes place.

### 2.7.2 *Prospective sensemaking*

Prospective sensemaking or future-oriented sensemaking is defined as “*sensemaking processes where the attention and concern of people is primarily directed at events that may occur in the future*” (Rosness et al., 2016, p. 55). Correspondingly, Gioia and Mehra (1996) argue that prospective sensemaking can be achieved by imagining the future. However, as presented before, sensemaking is characterised by its retrospective nature (Weick, 1995; Weick et al., 2005). This retrospective nature explains why the only possible way of creating meaning about the future is through future perfect thinking. Thus, future perfect thinking refers to the projection of actions as if they were already

over and finished thus, they bear a temporality of pastness (Schutz, 1967). In the realm of sensemaking, future perfect thinking takes place when the forward-oriented projection of ends is combined with the visualisation of the means to achieve them (Pitsis et al., 2003; Weick, 1979). Stigliani and Ravasi (2012) argue that questioning this fundamental claim can be ascribed as one of the causes of the lack of fully-fledged accounts of prospective sensemaking.

However, scholars (MacKay, 2009; Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015) have recently started to question whether prospective sensemaking can be further theorised. These claims arose from analysing the literature on sensemaking, which has privileged the study of episodic events. In the context of episodic events, a future perfect approach can be extremely valuable to manage the situation (see for examples Fuglsang and Mattsson, 2011; Pitsis et al., 2003), although this may not be the case for strategizing in complex and dynamic environments, according to MacKay (2009). In these environments, the future perfect approach may be not relevant to identifying changes and might create biases that constrain and reduce strategic action. MacKay's (2009) claim aligns with pragmatist notions that future perfect thinking closes the social world to what has been experienced or what is known (e.g. traditions, ideologies, and dominant stories) (Elkjaer and Simpson, 2011). In addition, it obscures a temporal argument about agency, namely that actors are "*embedded within many such temporalities at once*" (Emirbayer and Mische, 1998, p. 964), in which meaning is always oriented and shaped by contextual experiences.

The previous argument is extremely relevant for research on wicked problems. As wicked problems are defined as societal issues that are impossible to solve due to their incompleteness, ambiguity, and changing nature (Rittel and Webber, 1973), prospective sensemaking based on retrospection may fail to provide an image or a plausible construction of the future. Therefore, moving away from a retrospective future requires regaining the open-endedness of the future. This can be done by understanding how actors make sense of possible futures that overcome hegemonic ways of thinking and/or institutional capacities (Allard-Poesi, 2005; Brown et al., 2015). In these futures, any guide about "*what has happened in the past may be at best misguided and, at worst, pathological*" (Brown et al., 2015, p. 272; Colville et al., 2013). In addition, regaining

the open-endedness of the future requires an endless explorative search for meaning (Emirbayer and Mische, 1998) and acknowledging that some projects will exist, other may be under way, others are not yet conceived, and others will be never completed (Elkjaer and Simpson, 2011). Thus, in paper 3 I explore how organisational actors make sense of multiple futures through the construction of organisational metaphors that allow different interpretations and social enactments. These metaphors allow the open-endedness of the future to be reclaimed by (i) coordinating diverse responses to tackle wicked problems and (ii) linking what exists while providing enough room for what has not yet come into existence.

Another problem that is linked to the lack of theorising about prospective sensemaking is that most of the sensemaking literature has focused on crises. As crises happen within a short or medium time period, people may be not able to articulate and engage in prospective sensemaking (Stigliani and Ravasi, 2012). This emphasis on crises obscures the understanding of the “*practices and the production of social reality*” (Gephart et al., 2011, p. 281) as well as the processes of actors’ future coordination (Tavory and Eliasoph, 2013). In this regard, Tavory and Eliasoph (2013) argue that every time people interact, they coordinate and orientate action towards the future. Orienting action towards the future depends to a great extent on expectations that individuals construct in social interactions (Adam and Groves, 2007; Konlechner et al., 2018) and the skilful reading of social arenas (Mische, 2009). Moreover, when actors pitch towards the future, the social position, role, and capitals that people have might lead to different courses of action within a specific situation (Bourdieu, 1990). Thus, what people make sense of and how they do it depends on how they select and interpret meaning while enacting diverse social worlds (Allard-Poesi, 2005). On the basis of these premises, in paper 2, I explore how different organisational actors make sense of the future through the narrative construction of expectations.

## Chapter 3 Managing the changing manifestations of poverty: The case of Fe y Alegria 1955-2017

### 3.1 Abstract

The aim of this article is discussing poverty as a wicked problem while illuminating how organisational actors organise and adapt to the changing manifestations of wicked problems. Wicked problems are not only causally complex and lacking in definite solutions, but the same problem may re-emerge in different guises. Thus, tackling them organisationally requires constant adaptation, experimentation and renewal. Focusing on the problem of poverty, we conducted a longitudinal case study of Fe y Alegria ('Faith and Joy'), the largest international non-governmental organisation in the world providing education for the poor in extreme and marginalised contexts across 21 countries in Latin America, Europe and Africa. Drawing mainly on archival material and interview data, we trace the responses of Fe y Alegria (FyA) from its foundation by a Jesuit priest in Caracas, Venezuela, in 1955 to its current expansion to Africa. Our findings indicate how rapid socioeconomic transformations confronted the organisation with the challenge to adapt constantly to the changing manifestations of poverty—namely, from exclusion in remote rural areas to gang and gender-based violence in the cities. We identified seven organisational responses that extend the notions of 'collective action' and 'distributed experimentation'. The main contribution of this research is to provide theoretical elucidation about alternative ways of responding to wicked problems and the importance of multiple forms of organising to respond the changing manifestations of poverty.

**Keywords:** wicked problems, poverty, collective action, distributed experimentation, education

## 3.2 Introduction

In recent years, there has been an increasing interest in understanding how organisations deal with wicked problems (Dorado and Ventresca, 2013; Ferraro et al., 2015; Reinecke and Ansari, 2016). Wicked problems are defined as societal issues that are impossible to solve due to their incompleteness, ambiguity, and changing nature (Rittel and Webber, 1973). Previous studies on wicked problems have revealed the importance of reaching strategic accounts to cope with value conflict (Reinecke and Ansari, 2016), the importance of alternative ways of organising (Ferlie et al., 2011; Ferlie et al., 2013), and the role of knowledge in managing uncertainty (Brook et al., 2016; Camillus, 2008). Overall, these studies highlight issues around the significance of meaning and interpretation when organising to respond to wicked problems.

As wicked problems are becoming more notorious and difficult to tackle, management scholars have begun to explore how to better respond to them. In this sense, the extent literature has mainly focused on resolving value conflict between actors and managing knowledge (Peters, 2017). However, issues around how actors cope with the changing nature of the problem, known as dynamic complexity, remain under researched (Dentoni et al., 2018). Since wicked problems continually emerge, re-emerge in different guises and change, solutions cannot be static. Thus, the aim of this paper is to explore the following question: “How do organisational actors tackle a wicked problem that never ends?”

The exploratory scope of the research question called for a qualitative inquiry (Eisenhardt, 2011; Eisenhardt and Graebner, 2007). Hence, to unravel this question, we conducted a longitudinal, narrative analysis of *Fey Alegria* (“Faith” and “Joy”, hereafter noted as *FyA*), beginning with its creation in 1955 in Caracas, Venezuela. *FyA* is an international non-governmental organisation that has been alleviating poverty through education for more than 60 years in developing countries. Using a qualitative process methodology (Langley et al., 2013), we analysed documents, semi-structured interviews with 130 members of the organisation and ethnographic observations of the sites of operation. This array of data sources facilitated the reconstruction of the meanings associated with poverty in different stages, the organisational responses of *FyA*, and the social contexts in which the responses were elicited.

Our findings indicate that in order to manage the changing manifestations of poverty, actors need to experiment whilst engaging in collective action that allows the enactment of different social worlds simultaneously. The process of experimenting is possible by ‘thinking outside the box’ and using constraints as windows of opportunity. While the process of engaging in collective action is mediated by the inclusion of all actors related to the problem in participatory structures. Overall, our findings elucidate that when dealing with the changing manifestations of poverty inclusion, participation and experimentation must be enacted simultaneously. As such, actors can avoid exhausting resources whilst adapting to different manifestations of the problem over time.

The main contribution of this paper is to the literature of wicked problems. We shed new empirical light on how organisational actors respond and adapt to the changing manifestations of these problems. By analysing the responses of FyA actors we extend higher theoretical domains, such as collective action (Olson, 1965; Wasko and Faraj, 2005; Wiertz and de Ruyter, 2007) and distributed experimentation (Ferraro et al., 2015). In doing so, we also develop plausible responses that inform different dimensions of wicked problems. Additionally, our analyses offer novel insights into organising and problem solving. In terms of organising, we underscore the importance of including the affected individuals (Mische, 2014) as well as the relevance of participatory structures (Ferlie et al., 2013) and operating at different levels (Reinecke and Ansari, 2016). As for problem solving, we point out the need to see constraints as windows of opportunity and to translate experiences to new contexts. Finally, we contend that these explanations can be fruitfully linked to a conversation with the grand challenges literature (Ferraro et al., 2015; George et al., 2016), especially in terms of organisational constraints and coordinating architectures for action. In the following sections, we synthesize knowledge of wicked problems. Then, we explore how FyA responded to the changing manifestations of poverty and why this information is theoretically relevant.

### **3.3 Theoretical background**

#### *3.3.1 Wicked problems*

Organisational scholars have recently focused on large scale issues, specifically concerning problems that seem extremely complex, with low levels of clarity and

including multiple stakeholders (Ferraro et al., 2015; Reinecke and Ansari, 2016). In this analysis, the concept of wicked problems has emerged as a useful theoretical framework (Grint, 2010; Ferlie et al., 2011; Dentoni, 2018). Introduced in the planning literature by Rittel and Webber (1973), wicked problems denote complex issues, nearly impossible to solve that involve multiple causes and do not necessarily follow linear paths (Peters, 2017). Examples of wicked problems include poverty (Adam et al., 2016; Dorado and Ventresca, 2013), global hunger, climate change, the management of healthcare (Ferlie et al., 2013), and illegal drug use (George et al., 2016).

Rittel and Webber (1973) argue that wicked problems, in contrast to tame problems, have ten identifiable dimensions. First, the problem is unclear and difficult to define with its hidden elements, disguised information and intangible measures. Second, wicked problems have no stopping rule: no mechanism for deciding whether to continue or stop an intervention process. Third, solutions to wicked problems are neither right nor wrong. Fourth, there is no immediate test for solutions. Usually, results or consequences of intended solutions unfold over time. Fifth, all attempts to solve the problem have collateral effects or unintended consequences that may be irreversible. Sixth, there is no clear solution or solutions. Moreover, actors will never know if what they are doing is reducing the problem. Seventh, every wicked problem is unique. Eighth, wicked problems may be a symptom of other problems. Ninth, there are multiple explanations for the wicked problem with none being completely accurate. Tenth, wicked problems involve multiple actors and are socially and politically complex.

The key implication of these ten dimensions is that no stakeholder can tackle wicked problems alone. Put it differently, these problems are beyond one organisation agency. Hence, understanding how to deal with them requires delving into social processes and collective dynamics (Weber and Khademian, 2008). In this line of reasoning, recent research on wicked problems has focused on the role of knowledge in managing uncertainty (Brook et al., 2016; Camillus, 2008), the management of stakeholders conflict (Reinecke and Ansari, 2016), and the importance of alternative ways of organising (Ferlie et al., 2011; Ferlie et al., 2013).

Studies focusing on the management of uncertainty have focused on the role of knowledge (Dentoni et al., 2018). Following the uniqueness of the problem and the

impossibility of a definitive formulation, a specific focus has been placed on learning and unlearning. For instance, Camillus' (2008) analysis of the company PPG explains that organisational actors respond to incomplete information using Pareto analyses and the construction of future scenarios in feedback loops. Thus, Pareto analyses allow actors to learn from the environment while construction plausible visions of the future. In the case of unlearning, a study on social workers' responses to wicked problems, found that it may be necessary first to unlearn existing responses and then ask certain questions to understand what is not known (Brook et al., 2016).

In a related line, research on how actors handle value conflict has concentrated on how the meaning of a wicked problem is framed and interpreted and how this framing alters the way, in which actors respond to it. For example, drawing on the case of the "conflict minerals" in the Democratic Republic of Congo, Reinecke and Ansari (2016, p. 299) explain "*how responsibility can be attributed to a target by framing an issue and its root cause in ways that allow such an attribution, and how the attribution can diffuse and solidify*". Correspondingly, in the context of entrepreneurship, Dorado and Ventresca (2013) explored the institutional conditions and processes that promote the "possibility for" the engagement. In their analyses, entrepreneurs are more likely to engage with wicked problems when public awareness appears worthwhile and when there are clear benefits for action.

Finally, in terms of organising to respond to wicked problems, Ferlie et al. (2013) explain how networks can provide better forms of organising than market and hierarchical ones. Networks allow different actors to align aspirations and expectations while avoiding exhausting resources. Similarly, Dorado (2013) analysed the emergence of small commercial microfinance organisations in Bolivia. In this process, special attention was given to collaborative forms that depart from status quo perceptions.

Combined, these studies have advanced our theoretical understanding of how organisational actors manage some characteristics of wicked problems. These previous studies have shown that dealing with the unknown, organising and coping with conflict are contingent on the collective production of knowledge and social framing processes. However, in light of Rittel and Webber's (1973) characterisation, wicked problems are likely to change and become manifest in different ways. Thus, less is known about how

organisational actors manage dynamic complexity or the constant adaptation to the shifting manifestations of the wicked problem over time (Crona and Parker, 2012). Recent social and policy research (Cummins, 2018; Wisor, 2017) suggests that a closer look at poverty—and specifically at its changes through time—can enlighten us about issues regarding the continuous definition of the problem and the ongoing search for solutions. The next section elaborates on the concept of poverty as a wicked problem and its characteristics to study dynamic complexity.

### 3.3.2 *Poverty as a wicked problem*

Poverty can be a wicked problem because it results from multiple historical, structural, political, geographic and economic problems embedded in social structures. It is essentially unique, which is a symptom and a consequence of other problems lacking clear-cut solutions. Nonetheless, the need to alleviate poverty has been a long concern for policy makers and scholars. However, to date, no consensus has been reached concerning poverty's exact definition and causes.

*Definition:* Poverty has been conceptualised as a measurable income or resource driven concept (Townsend and Gordon, 2000). Correspondingly, the PNUD (2016) has defined it as the lack of necessary goods and services for an individual's well-being: a situation leading to physical deprivation. Based on these definitions, international agencies have measured poverty lines, averages of household income and international comparatives for the price of goods (Woodward and Abdallah, 2010).

Although poverty is often defined in economic terms, some scholars have challenged that view. For example, Amartya Sen (2000) redefined it in terms of lack of freedom. In other words, poverty relates to the deprivation of basic capabilities or genuine opportunities that an individual has reasons to value. Others such as Hills and Stewart (2005) define poverty as the conditions that exclude individuals from the normal functioning of the society. Finally, Woodward and Abdallah (2010) describe it as the absence of individual human rights. Indeed, with several definitions, each with emphasis on specific factors, we have multiple understandings of what poverty is and how it can be measured. Practically, this array of competing definitions raises challenges in terms of resource

allocation and the efficacy of solutions. Furthermore, as Wisor (2017) notes, we will never be able to capture an ultimate definition, as there is always more to it.

*Causes:* Economic research has explored the roots of poverty under two major perspectives. First, orthodox views assume that the causes are related to market dynamics and individual decisions (Rank et al., 2003). A key assumption here is that individuals play an active role in the outcomes produced and that familiar or individual habits guide economic action (Blank, 2003). Thus, low productivity or the conscious non-involvement in the market explains why some individuals do not generate sufficient wealth to satisfy basic needs. In other words, poor people are individuals whose habits and behavioural tendencies assure their poverty (Hyatt, 2001). Second, liberal views assume that poverty stems from inadequate levels of human, business, infrastructure, natural and knowledge capital (Sachs, 2005). Hence, the absence of capital and the underdevelopment of the market create macro-economic tensions that impede economic growth (Davis and Sanchez-Martinez, 2014).

However, scholars in public policy research see poverty as rooted in social and structural factors. For instance, Cummins (2018) argues that poverty arises from political and social systems that actively or passively marginalize actors. In his view, individuals cannot reach a minimum standard of living when structures perpetuate their social exclusion. Correspondingly, Wisor (2017) contends that poverty results from the violation of human rights. Thus, a poor person is someone who is denied the right to education, health care, adequate shelter, food, and so on. This line of reasoning has contributed to an exploration of poverty as a multifaceted phenomenon using measures such as the human development index, gender gap index and basic capabilities index.

Following Rittel and Webber's (1973) dimensions of wicked problems, table 3.1 presents explanations for why poverty provides a fertile case to analyse dynamic complexity. Consequently, the aim of this paper is to investigate the following: *How do organisational actors tackle a wicked problem that never ends?* To do so, we examine the case of Fe y Alegria (FyA, a non-governmental organisation) and its constant adaptation to the changing manifestations of poverty for more than 60 years as detailed below.

**Table 3.1 Poverty and Rittel and Webber’s dimensions of wicked problems**

Dimension	Explanation
1. There is no definitive formulation of the problem.	Defining poverty is probably impossible as Wisor (2017) argues. Moreover, there will always be incomplete information of causes.
2. Every wicked problem is essentially unique.	Recent studies (PNUD, 2016; Wisor, 2017) have noted that the design of anti-poverty policies needs to adapt to specific circumstances rather than “one size fits all” solutions.
3. Every wicked problem can be a symptom or consequence of other problem.	Poverty is a phenomenon involving social, historical, geographical, institutional and economic problems (Woodward and Abdallah, 2010).
4. Wicked problems have no stopping rule.	The process of tackling poverty has never stopped and many actors are considering the battle lost (Wisor, 2017).
5. Solutions to wicked problems are neither right nor wrong.	Research has pointed at different solutions, but available knowledge is fragmented among several actors.
6. The existence of a discrepancy representing a wicked problem can be explained in numerous ways.	Poverty unveils asymmetries of power and problems with communication that influence how people determine the nature of the problem’s resolution (Singer, 2010).

### 3.4 Methods

This research is grounded on a qualitative research design as it provides several advantages to answer questions about new phenomena (Reischauer and Mair, 2018). As the aim is to explore how organisations deal with dynamic complexity, we focused on a single case study. Three reasons led to this decision. First, a case study facilitates the investigation of a phenomenon in its real life context (Yin, 1994). Second, this method allows the examination of a phenomenon over time, generating richer insights (Cresswell, 1998). Third, a case study provides an “*opportunity to shed empirical light about some principles*” allowing “*analytic generalization*” (Yin, 2014, p. 40). Finally, to ensure the validity and consistency of the findings, we triangulated archives, interviews and observation data.

### 3.4.1 *Research Setting*

The research setting is Fe y Alegria (FyA), a satellite organisation of the Society of Jesus, a Catholic Religious Order commonly known as the Jesuits. Founded by a Jesuit priest in 1955, in the outskirts of Caracas, Venezuela, FyA has one main purpose: to alleviate poverty through educational opportunities that empower the poor and excluded. In this sense, FyA embraces the spirit of “popular education”. Currently, it operates 2.500 schools and technical centres in 21 countries. Whilst most of the centres are in Latin America (16), it has expanded to Africa (3) and Europe (2) in recent years. In total, FyA centres educate nearly 1.5 million individuals per year (Federacion Internacional Fe y Alegria, 2016a). FyA was chosen for this research because of its “revelatory” potential (Eisenhardt and Graebner, 2007, p. 27), as explained in the following three reasons. First, as an organisation, it has been working to alleviate poverty for more than 60 years and remains in operation. This time span allows the study of an organisation operating under the dynamics of the 20<sup>th</sup> and 21<sup>st</sup> centuries. Second, FyA’s experience of poverty alleviation entails 21 unique cases in different countries with distinct legal, social and political systems. Hence, the case lends itself to cross-case comparisons over time. Finally, FyA’s structure is heterarchical, comprising a network of 21 national offices that set policies to work collaboratively.

### 3.4.2 *Data Collection*

To explore how FyA actors manage dynamic complexity associated with wicked problems, we collected data from documents, semi-structured interviews and ethnographic observations. This data spans the foundation of the first FyA in Caracas, Venezuela, in 1955 to the expansion to Guinea in Africa in 2016.

**Documents:** We gathered 224 documents produced by FyA from 1960 to 2017. To obtain this extensive data, we were granted access to the official archives of FyA in Bogota, Colombia in 2017. These documents include historical information about each FyA national office, as well as strategic and operative plans used over the last two decades. To manage the documents, we divided them into three groups. The first group consists of autobiographical documents. For instance, we collected letters written by the founder of FyA in which he explains the journey of tackling poverty in 10 countries. A second group

is comprised of technical documents related to the different educational proposals. These documents include plans, evaluations and historical mementos. A final group of documents relates to promotional material directed at potential investors.

In addition, we gathered 120 public documents produced in Spanish by Latin American governments and multilateral institutions (i.e. Inter American Bank of Development, United Nations). These documents not only helped us comprehend the economic and social situation of Latin America from 1950 to 2018, but also allowed us to construct a timeline of events, identify key moments and characters in the story of FyA and explore the changes of poverty in different contexts.

***Interviews:*** We conducted 130 semi-structured interviews with members of FyA in five countries: Bolivia, Colombia, Ecuador, Paraguay and Spain. Here, purposive sampling was used to capture a plurality of visions vis-à-vis the alleviation of poverty. The interviews included National Directors (N=11 out of 21), middle managers and deputy managers (N= 58 out of 122), and employees at the federative level (N=61 out of 80). These interviews had two purposes. First, we aimed to understand the autonomous structure of the national FyA and their relationships over time. Second, we explored the narratives concerning poverty alleviation and their related responses. In this sense, the transcripts of interviews were used to complement archival sources. In general, the interviews allowed actors to narrate events in their own voices, thus enriching the historical accounts. Lasting from 45 minutes to two hours, these interviews were coded in NVivo V.11.

***Observations:*** A last set of robust data was derived from visits to eight countries where FyA has been operating with relative success: Bolivia, Brazil, Colombia, Ecuador, Paraguay, Peru and Spain. We conducted observations at 22 schools in remote rural areas, slums, high security prisons and areas controlled by drug cartels and guerrillas. Visiting these places provided evidence about the different actions deployed in dealing with dynamic complexity. In addition, the observations included ethnographic notes that were used to triangulate information found in the archives and interviews.

### 3.5 Data Analysis

The objective of this study was discovery. To find out how FyA actors have managed the changing manifestations of poverty, we needed to investigate historical accounts of the organisation and Latin America in general. The period from 1950 to 2016 was the focus for three main reasons. First, during the 1950s, Latin America started experiencing the consequences of the Second World War and the beginning of the Cold War era. These two events marked sweeping social and political changes that led to escalating rates of poverty in Latin America. Hence, they provide insights into the emergence of FyA. Second, Latin America is among the world's most imbalanced regions in terms of the disparity between the rich and the poor. Countries such as Colombia and Brazil have the highest levels of multidimensional poverty. The case of FyA and its Latin American coverage of 16 countries allows the examination of the region as a whole—and country-by-country. Finally, after 60 years of operation, FyA is probably the oldest non-governmental organisation (NGO) dealing with dynamic complexity in Latin America.

This study is grounded in classic narrative analysis (Riessman, 1993). It draws on the retrospective dimension of narratives to see the movement of events that are part of a larger whole. It is concerned with looking backward to construct a story that can transpire in time, with an identifiable plot and a sequence of events. By analysing the case of FyA through a retrospective narrative perspective, we not only explored what happened and when, but we also revealed how events and experiences may relate to one to another (Rhodes and Brown, 2005). Following Bruner (1991), we contend that narrative analysis deepens our understanding of the evolution of stories because of the interconnectedness of time and space. This type of analysis is extremely fitting for studying how FyA has responded to the wicked problem of poverty throughout 60 years.

The narrative analysis of FyA's constant adaptation to the changing manifestations of poverty followed four stages. First, we identified macro and micro events. As such, we constructed a timeline documenting each event (See figures 3.2, 3.5, 3.8, 3.9 in the findings section) (Gehman et al., 2013). This identification of events helped us to locate actors' stories in three major stages with seven sub-themes. The major stages explain FyA's evolution, starting with the organisation's beginning and expansion, moving to its design of an international federation, and finishing with its portfolio expansion. Second,

we moved to the analysis of each macro and micro ‘event in the plot’ (Riessman, 1993). This analysis allowed us to explain changes in the meanings associated with poverty. For instance, the period of 1950 to 1970 favoured an economic conception of poverty, whereas the years from 2000 to 2016 emphasised discrimination and exclusion as the major forms of poverty. Third, after identifying events and plots, we unveiled the responses that allowed FyA members to constantly adapt to the changing manifestations of wicked problem over time. These responses are: working with social actors to find and articulate solutions, using constraints to create opportunities, engaging in iterative and multilevel actions, creating participatory structures, thinking outside the box, engaging in complementary actions and translating experiences to new contexts. Fourth, we speculated how these responses relate to high theoretical concepts such as collective action (Olson, 1965) and distributed experimentation (Ferraro et al., 2015). Finally, we layered the longitudinal data to produce a synthesis in which a detailed composite narrative was constructed (Lincoln and Guba, 1985).

In sum, the analysis of FyA’s six decades elucidates the different processes that organisational actors experience in the continuous adaptation to the changing manifestations of poverty. As a final remark, we acknowledge that the reading of FyA is entirely ours and involves a certain degree of subjectivity and bias. Nevertheless, we consider that any other researcher could identify similar characteristics in FyA’s case. In the following section, we present enough raw data in the form of a composite narrative to persuade the reader.

### **3.6 Findings: Alleviating poverty for more than 60 years – The case of Fe y Alegria**

#### *3.6.1 Brief background of Latin America poverty*

Latin America has a long history of inequality, discrimination and poverty (Bertola and Williamson, 2017). However, it is not simple to understand poverty across different countries, as there are distinct ethnic groups and development processes involved through time (Prados de la Escosura, 2007). Even so, in the 20th century, three salient circumstances are common to most of the countries. First, the Cold War and the geopolitical division (Capitalism and Communism) of the world made several Latin American countries dependent on the USA (Aguirre, 2006). At the beginning of the

1950s, most of these countries had agrarian economies with low levels of development and industrialisation (Bertola and Williamson, 2017). This situation proved to be an advantage for the USA, as it conditioned international aid to its political alignment (Aguirre, 2006). In most cases, this financial support contributed to an accentuation of national economic asymmetries and the political control of landowners' elites (García, 2003).

Second, during a three-decade span (the 1950s to 1970s), military dictatorships arose to suppress communist ideas. Most of these dictatorships promoted progress whilst using authoritarian practices that restricted civil rights (Serrano, 2010). This political and economic model had a dramatic influence on the distribution of national wealth and the growth of rural areas (Serrano, 2010). Moreover, it was a source of marginalisation and discrimination. Leaders such as Videla in Argentina, Pinochet in Chile, Stroessner in Paraguay and Somoza in Nicaragua are remembered as some of the cruellest dictators.

Third, during the 1990s, most of the Latin American countries opened their markets to global commerce. Neo-liberal ideas regarding trade, competition and development intensified economic poverty, and decades later made visible other forms of discrimination that particularly marginalised women and indigenous people (Solano, 2009). Furthermore, globalisation also intensified the privatization process of public services such as water, sewage systems, electricity and health care, thus exerting more stress on the already poor and excluded (Estache and Trujillo, 2004). One way or another, these circumstances influenced the work of FyA, as explained in the next section.

### *3.6.2 The case of Fe y Alegria: 60 years of adaptation to the changing manifestations of poverty.*

As stated previously, Fe y Alegria is an international NGO conceived in the context of Latin America in the 1950s. It emerged in 1955 in Caracas, Venezuela, as a project aimed at empowering marginalised people through education. During the time of a military regime and low state investment in education, FyA provided something unthinkable: free education for the poor. However, the constitution, the expansion and associated responses of FyA can only be fully understood in the historical context of Latin America poverty,

as illustrated below. Currently, FyA operates in 21 countries (See figure 3.1) of three continents.

**Figure 3.1 Fe y Alegria international coverage by 2017**



Source: Fe y Alegria (<http://www.feyalegria.org/es>)

We begin the narrative analysis of how FyA managed dynamic complexity associated with wicked problems by examining the organisation’s constitution and expansion in Venezuela. In this section, special attention is given to how a Jesuit priest—in collaboration with the marginalised and other religious orders—developed educational solutions. Then, we investigate how economic and social similarities led to the establishment of FyA in adjacent Andean and Central American countries. These processes covered a period of three decades: the fifties, sixties and seventies. In the second part, we analyse two important processes that took place during the eighties and nineties. First, we explore how the national FyAs started to share experiences and establish an International Federation to work collaboratively. Second, we discuss the emergence of a network of radios that strove to reach the invisible marginalised. Finally, in the third part, we analyse the narrative change from economic poverty to social forms of inequality and discrimination. This section focuses on how national FyAs and the International Federation increased their portfolio of actions to tackle social inequities.

Finally, we present the case of FyA in Africa. This last part illustrates how the translation of specific processes used in Latin America helped members responding to poverty in new settings on the other side of the world. Table 3.2 summarizes the changing manifestations of poverty, associated responses and the context of FyA. Overall, the case of FyA is particularly enlightening as an example of *how organisational actors tackle a wicked problem that never ends*.

*Table 3.2 Changing manifestations of poverty identified in the case of Fe y Alegria 1954-2017*

<i>PERIOD</i>	<i>1954 - 1956</i>	<i>1959 - 1961</i>	<i>1961 – 1976</i>	<i>1984 - 1986</i>
<i>LOCATION</i>	Venezuela - Periphery of Caracas	Venezuela - Urban Slums and Rural Areas	Ecuador, Bolivia, Panama, Peru, El Salvador, Colombia, Nicaragua and Guatemala	Latin America
<i>PLOT</i>	Schools where the asphalt ends	The dismissal of the poor across Venezuela	A story of similarities and social tragedies	Alone we cannot fight poverty.
<i>POVERTY PROBLEM</i>	Absence of public services (water, electricity, education, health and so on) in the urban periphery of Caracas	Population forgotten by the government, no access to any public service	Latin American countries experience a lack of governmental investment in rural areas, an increase in the population of urban slums, high rates of violence and illiteracy is the norm among poor people.	Countries with high levels of unemployment, national currencies devaluated exponentially and negative economic growth
<i>RESPONSE</i>	Working with social actors to find and articulate solutions	Using constrains to create opportunities	Iterative action based on previous learnings.	Engaging in multilevel actions and creating participatory structures
<i>ORGANISATIONAL CONTEXT</i>	Construction of primary and secondary schools in urban slums	Construction of schools in ranches, inhospitable mountains and the abandoned rural	Plant a seed and empower people to construct their own schools for the forgotten by God.	A network of organisations that work collectively to support, learn from each other and find international resources.

<i>PERIOD</i>	<i>1980 - 1996</i>	<i>2000 - 2017</i>	<i>2008 - 2017</i>
<i>LOCATION</i>	Venezuela, Paraguay, Ecuador and Bolivia	Latin America	Chad, Madagascar, Rd Congo and Guinea
<i>PLOT</i>	Reaching the invisible excluded	Aiming at the marginalised and excluded minorities	Other places experience the problems of Latin America in the past.
<i>POVERTY PROBLEM</i>	Cuts in social welfare: Problems to educate prisoners and adults with no knowledge of work skills	Changes in the meanings associated to poverty: Poverty then reflected systemic and historical issues of social exclusion and lack of equality and opportunities.	People of different ages, genders and demographic profiles are illiterate. Governments cannot sustain public investment; rural areas are left behind in development.
<i>RESPONSE</i>	Thinking outside the box: Using radios to reach the invisible	Deploying complementary actions: Improving the portfolio of FyA	Translating previous experiences of Latin America
<i>ORGANISATIONAL CONTEXT</i>	A series of radio stations that provided complementary education	An organisation working in gender, minorities and violence topics	An organisational expansion to new places

### 3.6.3 STAGE ONE: *Fe y Alegria* beginning. Rural areas of Venezuela and Latin America in the 1950s, 1960s, and 1970s

#### 3.6.3.1 Schools where the asphalt ends: Working with the poor in the periphery of Caracas (Venezuela)

**Poverty problem:** In 1948, Venezuela's democracy collapsed when a military coup deposed president Romulo Gallegos. The military government was characterised by the command of a *caudillo* who privileged the status quo (Rodriguez, 2012). This regime built its pillars on an oil extraction policy and low social investment (Rodriguez, 2012). From 1950 to 1958, the GDP (Gross Domestic Product) grew 7.8%, yet the nation's wealth remained concentrated in only a few hands (Bitar and Troncoso, 1983). The precarious social investment was evidenced by a total absence of public services (water, electricity, education, healthcare, and so on) in Caracas's urban periphery.

**Response:** Working with social actors to find and articulate solutions.

**Organisational context:** FyA is a project that started with the conviction of Father Jose Maria Velaz that the Society of Jesus had greatly lost its audacity and its missionary spirit that had impelled it to always look for new and more risky endeavours (1970)<sup>4</sup>. Velaz came to this conclusion after serving as the principal in a school in Merida, Venezuela, in the 1950s and by observing how the Society ran other schools in Venezuela. Most of these schools failed to comply with Saint Ignatius's creed<sup>5</sup> (Velaz, 1951)<sup>6</sup>. Instead, they offered education to the elites of Caracas and Maracaibo. However, in 1954 Velaz saw an opportunity to reconcile himself with Saint Ignatius's creed after being appointed as "spiritual father" in the recently founded Andres Bello Catholic University in Caracas, Venezuela (Saez, 1999). His mission there was to be the university students' spiritual guide. During his classes, Velaz emphasised the need to aid the poor, as he noted, "*university students should get in touch with poor people and lose their bourgeois*

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<sup>4</sup> Manuscript notes taken from his notebook.

<sup>5</sup> The life of Saint Ignatius is marked by this search for God in all things from union with Christ, by feeling with the church and by serving the other, the poor and the universal good.

<sup>6</sup> Vélaz letter to J. Aguirre (Mérida, 14 June 1951)", AFA. Correspondencia Enviada (1951)

*character; otherwise they will always have a bourgeois mentality*” (Ultimas Noticias, 1954)<sup>7</sup>.

By December 1954, Velaz and some students spent frequent Saturdays and Sundays visiting an urban slum in Caracas called “Gato Negro” (Black Cat) (Saez, 1999). In his autobiography, he (1984)<sup>8</sup> describes this slum as follows: “...*it was pure hell, there was nothing...garbage piled up everywhere and black water running down the hill guided only by the law of gravity. The air was filled with dirt and stench. It was like an immense urban leprosy that corroded the periphery of Caracas and, according to a recent census of that year, it included more than 315,000 marginal inhabitants of the capital*”.

During his visits, Velaz offered Mass and First Communion to the neighbourhood children. However, throughout his interactions with the inhabitants, he realised that religious exercises could not change anything. In the words of Velaz (1984)<sup>9</sup>: “*It was a horrible picture of degradation and social debasement. What at first sight caught my eyes was only the purulent skin of a deep disease whose most tragic symptoms were generalized unemployment, undernourishment, family disintegration, abandoned childhood, un-healthiness and ignorance before all the demands of life.*”

Throughout his visits, people from the “Gato Negro” usually asked Velaz and the students why they would visit them in such an abandoned neighbourhood, where there were no public services or anything else to do (Perez Esclarin, 2010). Given the atmosphere of trust that he developed through his frequent visits, Velaz was able to engage in dialogues in which individuals aired some of their problems. Although recurrent complaints concerned the water and electricity, the most serious problem for the inhabitants was the absence of a school for the boys (Perez Esclarin, 2010). These dialogues and Velaz’s strong conviction of working under the St. Ignatius creed altered his initial plan. A new way of perceiving poverty emerged for him: “*Deep poverty is not in the mean food, in the ragged clothes, or in the unhealthy and miserable dwelling; it is in the heads of the*

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<sup>7</sup> “Es indispensable quitarle el carácter burgués al universitario, acercarlo a los medios populares.” Ultimas Noticias (Caracas, 14 marzo 1954), 36, cols. 1-3.

<sup>8</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

<sup>9</sup> *Ibíd.*

*impoverished and slaves of ignorance*” (Velaz, 1984)<sup>10</sup>. Responding to the clamour of the people, Velaz “discarded aids in form of food or sanitary type...and decided to create a school” (Saez, 1999). The problem then moved to how, where and with whom.

Velaz’s problem was disclosed after one of his last catechisms: “*If we want to make an impact, we are wasting our time with these catechisms; we have to turn them into a real school*” (Perez Esclarin, 1999)<sup>11</sup>. Whilst most of the attendees kept silence, a bricklayer called Abrahan Reyes, father of eight children, approached Velaz and said, “*If you want to make a school, I give you my local*” (Marquinez, 1987a)<sup>12</sup>. Abrahan knew that children did not have a school and that his local could serve as a starting point. For Velaz (1984)<sup>13</sup> “*that simple place, with the rustic concrete floor that Abrahan Reyes had built by his hand, burying in it the savings of seven years, represented an example of tenacity and generosity*”. The next step was to look for teachers. After seeing Abrahan gesture, Diana and Carmen, two young women who had recently finished high school, offered to serve as unpaid teachers (Saez, 1999). Finally, on March 5, 1955, a small poster outside Abrahan’s local publicised “*school we admit boys*” (Saez, 1999). That day, approximately 100 young boys attended school for the first time. Although, it was an amazing beginning, “*there were no seats or tables...the small boys had to seat on the rustic concrete floor*” (Velaz, 1984)<sup>14</sup>. Days later, after seeing such a success Abrahan donated half of his house for a girls’ school (Saez, 1999). Responding to the new call, 75 girls arrived. They were the first students of Velaz’s initiative supported by the community. In Velaz’s words, he explains the origin of the name Fe y Alegria: “*joy of giving and receiving*” and “*faith of believing that we all have more good than bad... that we are all summoned if we are presented with a flag that is worth it*” (Lazcano s.j., 2013)

The foundation of the first school did not complete Velaz’s plans. On the contrary, it increased his desire to work with the poor. His idea moved from founding a school in a severely neglected area to a series of schools to educate the poor of Caracas (Perez Esclarin, 2010). At this time, Velaz was conscious of the mounting task he was

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<sup>10</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

<sup>11</sup> Raíces de Fe y Alegria. Testimonios (N.D). Compilación de Antonio Perez Esclarin

<sup>12</sup> ¿Cómo nació Fe y Alegría?. Caracas: Federación Internacional de Fe y Alegría.

<sup>13</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

<sup>14</sup> *Ibíd.*

undertaking. Among several concerns, his most significant one referred to the sustainability of the school in “Gato Negro” and the future of the not yet founded schools. At this point, FyA funded his operation via small donations from the inhabitants of the urban slums. Despite the genuine efforts of the local community, the amount generated was insufficient (Perez Esclarin, 2010). Using his role as “spiritual father”, Velaz sent letters to former students to request financial assistance. Even though not all the students replied, Velaz received enough money to improve Abraham’s house and to launch a new school in another urban slum called “Union del Petare” (Caracas) (Saez, 1999).

In less than a year, by January 13, 1956, FyA had expanded to “Union del Petare”, Caracas (Lazcano s.j., 2013). Learning from his previous experience, Velaz realised that he needed constant help to manage the schools. This time, he asked the Missionaries of Mother Laura, an order of nuns from Colombia, to take the administrative control. Velaz saw in the nuns two key characteristics needed for the project: resilience and the need to experience the vows of poverty (1985)<sup>15</sup>. By October of 1956, the new school had 900 students, most of whom were between 16 and 18 years (Saez, 1999). At this point, Velaz faced two immediate problems. On the one hand, FyA needed a real source of financing, as he could not rely on continuous donations from former students of the Catholic University. On the other hand, the individuals working in FyA should be professional and work full-time for the project (N.D)<sup>16</sup>.

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<sup>15</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

<sup>16</sup> Raices de Fe y Alegría. Testimonios (N.D). Compilación de Antonio Perez Esclarin

*Figure 3.2 Velaz in an urban slum in Caracas – (date of the picture unknown)*



Source: Marquínez, Ignacio. (1987). *Cómo nació Fe y Alegría? 1955-1980*.

### 3.6.3.2 Slums are not only a problem of Caracas: The dismissal of the poor across Venezuela

**Poverty problem:** In addition to low wealth distribution and low levels of public investment in Venezuela during the 1950s, there was a clear divide between the elites in the cities of Caracas and Maracaibo and the poor in rural areas of the country. Nearly 60% of the population lived in rural areas (UNICEF, 2005). Most of these areas lacked basic public services, including sewers and electricity (Bitar and Troncoso, 1983). Furthermore, the predominant rural area covered approximately 90% of the country's territory (González Guerra, 2015). Regarding education, in the 1950s, 49.04% of the population was illiterate (INFORMATICA, 1983).

**Response:** Using constraints to create opportunities.

**Organisational context:** By 1959, Venezuela had suffered ten years of a military regime and was transitioning to a democratic government. During 1948-1958, the military regime

prioritized the oil sector, ignoring the provision of public services (Rodríguez, 2012). Thus, socioeconomic disparities increased among Venezuelans. Most of the inequities were evidenced in the growing number of urban slums and the absence of public services in rural areas. Under these circumstances, Velaz saw an opportunity for FyA's expansion in Venezuela. (Velaz, 1961)<sup>17</sup>.

The expansion of FyA outside Caracas started in the densely populated urban slums of "El Manzanillo" (See figure 3.3) and "Altos del Jalisco" in Maracaibo. In 1959, Maracaibo was the second largest city in the country. However, in contrast to Caracas, it was highly underdeveloped. Learning from his experience in Caracas, Velaz encouraged nuns to comply with their poverty vows. This time the congregations of the Sisters of Pilar and the Religious of Nazareth decided to participate in FyA's initiative. Compared to FyA in Caracas, FyA in Maracaibo did not start with a gift, as the Sisters and Velaz simply invaded some places to build the new schools (Saez, 1999).

**Figure 3.3 Urban slum of "El Manzanillo" – 1961**



*Source: Marquínez, Ignacio. (1987). Cómo nació Fe y Alegría? 1955-1980.*

Guided by the previous successful experiences, FyA continued its expansion in Venezuela. On November 27, 1961, Velaz legally established "Fe y Alegría del Oriente

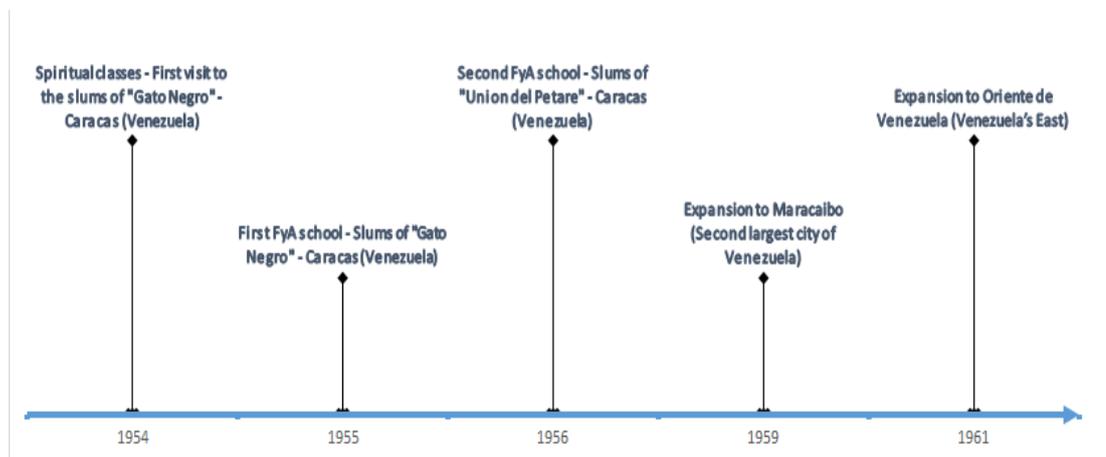
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<sup>17</sup> Noticias N° 52 (Caracas, 1° marzo 1961), 10. La nota añade que la Junta Directiva del Zulia la encabeza el Dr. José Enrique Arreaza Urdaneta (antiguo alumno de Mérida), y la componen Noel Virgilio López, Vera Izquierdo, Sr. Hildenwich y José Joaquín Castro. El director general de aquella primera "sucursal" de Fe y Alegría era el P. Pascasio Arriortúa, S.J.

de Venezuela” (Venezuela’s East). This new FyA aimed to cover the states of Anzoategui, Bolivar, Guárico, Monagas, Sucre, Miranda and Amazonas. The previous geographical states nearly covered 80% of Venezuela (Saez, 1999). Most of these states were predominantly agrarian and farmers did not have access to minimum services. Generally, the new FyA centres were not only for education, as the buildings were used to organise political action via cooperatives and to disseminate God’s parable (Saez, 1999).

In his autobiography, Velaz (1984)<sup>18</sup> recalled that most of the schools that opened during the Venezuelan expansion “started in hired ranches, in sheds that grew on precipices and ravines, next to garbage dumps or rivers of black water, in inhospitable mountains, namely in those places that nobody care”. However, for some of the inhabitants of these areas forgotten by the government, Velaz “made us see that we were worth it, that we were not garbage, that we were not a thing thrown out there, worthless” (1984)<sup>19</sup>. By 1961, it was informally acknowledged that three out of every 200 students of primary school in Venezuela belonged to schools of FyA (Saez, 1999). Figure 3.4 summarizes the development of FyA in Venezuela from 1954 to 1961.

**Figure 3.4 Fe y Alegria – The beginning in Venezuela**



<sup>18</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

<sup>19</sup> *Ibíd.*

### 3.6.3.3 The expansion of Fe y Alegría in Latin America: A story of similarities and social tragedies

**Poverty problem:** Latin American countries experienced a lack of public investment in rural areas. Massive migrations from rural to urban areas increased the population of urban slums. In addition, in most Latin American countries, the experience of high rates of violence and illiteracy was the norm among the economically disadvantaged in both urban and rural areas.

**Response:** Iterative action based on previous learnings.

**Organisational context:** It is difficult to pinpoint when Velaz started thinking about expanding FyA beyond his beloved Venezuela. However, letters shared with fellow Jesuits in other Latin American countries can be traced to 1961 (Libro de Actas y Acuerdos, 1961). In these letters, Velaz formulated the problem of lack of education for the poor and the potential solution that FyA provided through popular education, which was perceived by Velaz as an ethical proposal. He saw it as a transformative education policy encouraging the excluded to become subjects of power and actors of their life (Velaz, 1979<sup>20</sup>).

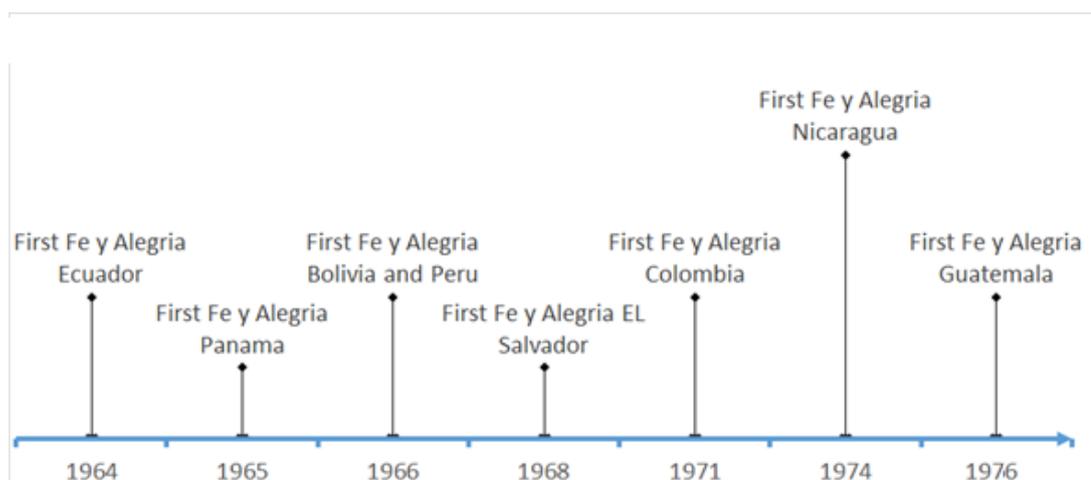
Additionally, Velaz's letters (1984)<sup>21</sup> strongly emphasised that *"Ibero-American problems must be solved by Ibero-American solutions, applied by Ibero-Americans. Our ruling classes do not have confidence in themselves, they despise their roots, they try to imitate and live like Europeans or Americans in their own homeland"*. Velaz's letters had an impact on some of his fellows who in 1964 assumed popular education as a system to follow. Jesuits from Ecuador, Panama, Peru and Bolivia were the first ones to adopt it. Figure 3.5 presents the expansion of FyA in Latin American countries.

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<sup>20</sup> "Pedagogía de la Alegría. Notas de apoyo para las reuniones de fin y de comienzo de año en San Javier del Valle", manuscrito del P. José María Vélaz fechado el 12 de noviembre de 1979.

<sup>21</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

**Figure 3.5 Fe y Alegria –The Latin American expansion 1964 -1976**



The first country of FyA’s Latin American expansion was Ecuador in 1964. However, entering Ecuador was not as expeditious as was entering Venezuela because of three obstacles. First, by 1960, Ecuador had experienced several governments that believed that official education should be provided by the state (Direccion Nacional Ecuador, 1999). Laws established the notion that education should be public and secular. Although private education was permitted, no public funding could be allocated to it. Second, Velaz knew that if he wanted to create a project that could endure, he needed the help of the Society of Jesus. Nonetheless, the Jesuit provincial<sup>22</sup> of Ecuador at that time feared the responsibility of managing such a massive project. As a result, the provincial informed Velaz that he only authorized the entrance of FyA, but the Jesuits from Ecuador would not offer any help officially (Direccion Nacional Ecuador, 1999). Third, just as in Venezuela, the Society of Jesus had schools that mainly educated the medium-high class of Ecuador.

Knowing the difficulty of the situation, Velaz started his journey again in the urban slums of Quito and Guayaquil. Over several days, he tried to find new collaborators to plant the seed of FyA. Velaz’s visits showed him that the Ecuadorian poor were not that different from their counterparts in Venezuela. To his surprise, he was *“favourably impressed by the great desire for culture in the town and by the concrete and valuable offers that were*

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<sup>22</sup> Person that is in charge of the Jesuits from a specific region.

*made from the first moment*” (Velaz, 1984)<sup>23</sup>. Consequently, FyA Ecuador was launched with the help of secular people. Similar to FyA Venezuela, the construction of FyA Ecuador was made possible through the concerted efforts of many ordinary people who saw in popular education a flag to follow. By 1968, the schools of FyA Ecuador had eight schools and provided education for more than 2700 students (Fe y Alegria Ecuador, 2016)<sup>24</sup>.

**Figure 3.6 School of Fe y Alegria in Ecuador (Date of the picture unknown)**



Source: Fe y Alegria Ecuador. (2004). Fe y Alegria y sus 40 años de presencia en el Ecuador

In 1965, Velaz founded FyA in Panama, specifically in an urban slum that he had visited before near the canal area of Panama City. Called “Curundu”, this slum was inhabited by nearly 10.000 people. The landscape surprised Velaz. He saw tiny, uncomfortable houses made of old boards and sheets of oxidized zinc. There was not a single tree, not even a square metre of grass. The stench of black, polluted water permeated the air. Worst of all, this water blocked the path so small wooden bridges were necessary for the daily transit of the neighbourhood’s inhabitants. In moral terms, Curundú was the land of promiscuity, theft and vice (Jaen, 1999). After his journey, Velaz suggested that FyA start its operation in such a complex place. Not long after his visit, the first FyA School opened

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<sup>23</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

<sup>24</sup> Fe y Alegria Ecuador. <http://www.feyalegria.org.ec/index.php/quienes-somos/historia> (Retrieved the 12<sup>th</sup> of March, 2017).

on May 11, 1965 with the aid of the Sisters of La Presentacion who travelled from Colombia (Historial, 1965)<sup>25</sup>.

However, the emergence of FyA Panama differs from the beginning of FyA in Venezuela and Ecuador in two ways worth mentioning. First, by the 1960s, Panama had one of the lowest illiteracy rates of Latin America that nearly accounted for 25% of the population (Jaen, 1999). Second, in contrast to Ecuador, the Jesuits of Panama saw in Velaz's project a way to help the poor. Despite the lower levels of illiteracy, Panama had a major problem of poverty outside Panama City. It was for these regions that the Jesuits considered that FyA could be an important Jesuit project.

After Velaz planted a seed with the first school, the new director of FyA Panama decided to build a second school in "Bocas del Toro". This was the most isolated province of Panama in the frontier region bordering Costa Rica. By 1966, the only way to get there was by boat (many hours of navigation in the Atlantic) or by plane (Jaen, 1999). It was also one of the most impoverished provinces of Panama, not in terms of its possibilities (abundant and good land) but in terms of government policies coverage (Federacion Internacional Fe y Alegria, 1999). Interestingly, the building of the second school of FyA in Panama had some similarities with the foundation of the first FyA in Venezuela. The school was started through the generosity of a woman named Gumercinda who donated the whole ground floor of her house for the school. By 1969, FyA Panama was operating four schools that served approximately 2.000 students at the elementary and secondary levels (Jaen, 1999).

The third country of FyA's expansion was Bolivia in 1966. This time Velaz was not the one making the initial visit. Instead, a Jesuit named Jose Vidal asked his provincial to invite Velaz to speak about FyA (Federacion Internacional Fe y Alegria, 1999). Thus, Velaz was summoned to explain his project and to analyse the feasibility of an operation in Bolivia. After several meetings, the provincial of Bolivia accepted the idea of "*offering educational opportunities to the poorest of the poor*" (Marquinez, 1987a, p. 179).

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<sup>25</sup> Historial (N.D). Notas personales de una de las religiosas in Raices de Fe y Alegria. Testimonios (N.D). Compilación de Antonio Perez Esclarin

The conditions of possibility of FyA in Bolivia are similar to the ones presented in Venezuela, Ecuador and Panama. For instance, similar to Venezuela, during the 1960s, Bolivia had an enormous paucity of schools and high levels of illiteracy in rural and urban areas. Hence, FyA could fill a gap that was not yet addressed by the government. In addition, like their counterparts in Panama, the Jesuits of Bolivia saw in FyA a way to adhere to Saint Ignatius's legacy. Finally, similar to the cases in Venezuela, Ecuador and Panama, the local community participated in the construction and management of the schools. Among the most notable examples of community cooperation are the schools of "La Merced" (See figure 3.7), "Copacabana" and "Corazon de Jesus" in the urban slums of La Paz (Federacion Internacional Fe y Alegria, 1999).

*Figure 3.7 First Fe y Alegria School in the slums of La Paz (Bolivia)*



Source: Entreculturas (2016). Fe y Alegría Bolivia cumple 50 años

Peru was the fourth country of expansion in 1966. This was the first time that Velaz realised that his project was growing exponentially. However, it also made him acutely aware of the familiar narrative of Latin America's poverty. By 1950, Peru had primarily an agrarian-based economy. It was a country characterised by three salient conditions. First, as the rural regions were neglected by government policies, there was an exodus to the inner cities, such as the metropolitan area of Lima (Federacion Internacional Fe y Alegria, 1999). This uncontrolled migration led to illegal settlements that accounted for 47 slums by 1957. Second, the Peru of this time was illiterate, and education was deemed

a luxury (Perez Esclarin, 2010). Four of the biggest provinces of Peru (Ayacucho, Huancavelica, Apurimac and Cusco) represented the country's highest rates of poverty, illiteracy and unemployment.

Before entering Peru, Velaz was attracting charitable donations using the experiences of Venezuela, Ecuador and Panama to expand to other countries. Due to a fierce campaign in the USA, Velaz received a donation of \$25.000USD from a brewery businessperson from Chicago. In June 1965, Velaz arrived in Lima with two close friends: Iñaki Martinez and Jose Alcalde. Learning from Velaz's earlier experiences, Iñaki visited the urban slums of Lima to speak with its inhabitants. However, this time, the actual construction of the schools did not fall solely on the shoulders of the poor. On the contrary, Iñaki looked for land owned by the government that FyA could purchase. After identifying five spots in the slums, FyA embarked on the simultaneous construction of five schools (Federacion Internacional Fe y Alegria, 1999). This was the most ambitious project that FyA had ever conducted. Like the previous cases, FyA had the help of the local Jesuits, various congregations of nuns, and the inhabitants of the slums who contributed financially via raffles to sustain the schools.

In 1968, El Salvador became the fifth country of expansion. By then, it was one of the most dangerous countries of Latin America (Vilarasau, 1999). This is a period marked by stark differences in the society and a military regime characterised by high doses of repression. Like their counterparts in the other countries, the rural inhabitants of El Salvador were illiterate and destitute, resulting in internal migration to the cities and the emergence of illegal settlements (Vilarasau, 1999). Thus, Velaz's proposal found in El Salvador a favourable echo. In contrast to the previous expansions of FyA, the project in El Salvador was not established directly by Velaz. This time the torch was passed to a different Jesuit: Father Joaquin Lopez, nicknamed Lolo. Lolo shared with Velaz the conviction that integral education was the best weapon to combat poverty and dignify human beings. Moreover, it was the only possible way for the true and just development of a people (Vilarasau, 1999). Lolo is remembered in FyA Salvador for one of his parables *"If your projects are for a year, sow a grain. If they are for ten years, plant a tree. If they are for a hundred years, then instruct people"* (Perez Esclarin, 2010).

The beginning of FyA El Salvador can be traced to May of 1968 when Lolo and a group of 13 individuals (Jesuits and secular) decided to write the statutes of the organisation (Vilarasau, 1999). Following the paths of fellow FyA supporters in other countries, Lolo and his collaborators decided where to operate. After long discussions, it was decided to open three schools. The first one was located in Acajutla, in an area called "la vida no vale nada" (life is worth nothing), one of the most destitute places in El Salvador. The second site was in San Miguel, in the urban slums of La Curruncha, and the third one in Colonia Morazán de La Chacra, where there was already a small sewing academy, promoted by the sisters of La Asuncion. By 1970, the three schools of FyA El Salvador accounted for 685, 725 and 465 students respectively.

Colombia was the sixth country in which FyA expanded in 1971. Given its proximity to Venezuela, it was fitting for FyA to establish itself in Colombia. Nonetheless, Velaz could find FyA Colombia only ten years later—after receiving a donation from Spain and the official acceptance of the Colombian provincial (Federacion Internacional Fe y Alegria, 1999). Similar to the original experience of Caracas, the schools of FyA Colombia started in marginalised slums, specifically, those of Bogota, Medellin and Cali. These slums were characterised by the paucity of public services, roads, electricity and governmental presence. The three first schools of FyA Colombia were built in a barn, a paddock and a communal building donated by the community (Federacion Internacional Fe y Alegria, 1999). Like Venezuelan schools of FyA, the Colombian ones also operate as centres for nutrition aid and communal activities. Again, FyA was not possible without the contribution of the local actors that saw in the project a way to change their reality and the congregations of nuns that sustained the administrative activities.

The final two expansions before the 1980s were to Nicaragua in 1974 and to Guatemala in 1976. Both cases present three similarities. First, Nicaragua and Guatemala had high levels of external debt. By the 1970s, most of the public income served to pay the debt (Pedrosa, 1999). Consequently, public policy virtually ignored social programs. Second, the national realities were characterised by extensive rural areas where inhabitants suffered malnutrition, hunger, unemployment and illiteracy (Morales, 1999). Third, Velaz did not fund FyA in Nicaragua and Guatemala. In the case of Nicaragua, one Jesuit called Eduardo Odriozola embraced FyA as a way to help the poor. In the case of Guatemala

FyA, two nuns initiated it: Blanca Carballo and Mercedes Rodriguez, who had worked at FyA Ecuador. In both cases, these FyA centres continued Velaz's foundational roots by involving the poor at the outset. For instance, Sisters Blanca and Mercedes spoke with inhabitants of "Barranco" to build the first school in Guatemala (Morales, 1999). Similarly, FyA Nicaragua started in the slums of Ciudad Sandino and "Schick" in 1974 (Pedrosa, 1999).

### 3.6.4 STAGE TWO: *Together we are stronger and can fight harder. Searching for new ways to alleviate poverty in the 1980s and 1990s*

#### 3.6.4.1 The foundation of the International Federation: Alone we cannot fight poverty

**Poverty problem:** In Latin America, the decade of the 1980s is known as the lost decade. During this period, most of the countries struggled to pay their external debts. They faced soaring internal deficits, inflation levels of 300% and exponential devaluations of national currencies (Estay Reyno, 1991). This situation stemmed from a decline in the price of raw materials and the increase in interest rates in industrialized countries (Estay Reyno, 1991). Hence, most GDPs of Latin American countries grew less than the world average. Consequences of the lost decade continued into the 1990s. The most prolific economies—Argentina, Mexico and Venezuela—experienced a slow recovery, whilst others, such as Peru and Colombia, underwent aggressive privatization processes.

**Response:** Engaging in multilevel actions and creating participatory structures.

**Organisational context:** In 1970, the different directors of the countries in which FyA operated started to gather once per year. During these meetings, directors shared experiences and reflected on various challenges. In a time without personal computers, the Internet and email, communication could take up to six months, so having a network of homologous directors was seen as an important factor to sustain growth (former secretary (Federation), 2016 - Interview). Also, during this period, Velaz used for the first time FyA's most recognized phrases: "*where the asphalt ends*", "*where there is no potable water*", and "*where the city loses its name and its human face*" to describe the

places of operation (1985)<sup>26</sup>. During the first meetings, then called “Assemblies”, most of the reflections pertained to topics such as FyA’s mission, the appropriate teaching methods and possible ways of working collaboratively (former secretary (Federation), 2016 - Interview).

Collaboration became a major issue in 1976. By this year, directors voiced the need to create a permanent institution that could help members actively in the most essential aspects of education and in the social and economic sustenance of FyA (Contribución a los futuros estatutos de Fe y Alegría, 1976). The idea of having a permanent institution generated three main reflections. First, for Velaz, given FyA’s infancy, it was too early to think about a supra-entity. In his opinion, having such an “institution” could centralise decision-making processes (Fe y Alegría: Características principales e instrumentos de acción, 1981). Second, for some members, FyA was a movement; therefore, the idea of an “institution” could erode “moving” in a literal sense (former secretary (Federation), 2016 - Interview). Finally, the members who agreed on the need for a permanent institution faced another issue: What type could suit everyone? (former secretary (Federation), 2016 - Interview). Although Assemblies continued annually, the idea became lost somehow as the discussion moved to the construction of the principles of FyA (secretary (Federation), 2016 - Interview).

As social conditions started to deteriorate at the beginning of the 1980s, FyA actors felt the need more than ever to construct an official set of foundational principles. In their view, *“having a clear identity could lead them to find solutions collectively, while keeping their local distinctiveness”* (Project manager for Latin America (Spain), 2017 – Interview). The process of constructing some tenets started in 1981 and took three years until the November 14, 1984 (Fe y Alegría, 2016)<sup>27</sup>. After years of discussions, five major principles emerged. First, FyA is a movement of popular education aimed at building a fairer and fraternal society. Second, FyA’s priority is the poor, no matter how poverty was experienced. Third, FyA will strive through popular education to empower the poor, thus making them agents of change. Fourth, FyA will continuously find paths to bring out

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<sup>26</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

<sup>27</sup> Peru, 2016 – General Assembly (Direct Observation) and Colombia, 2016 – Workshops (Direct Observation).

the voice of the community. Lastly, each country is autonomous in principles and operation (Pensamiento de Fe y Alegria: Documentos de los Congresos Internacionales, 2008, p.11-18). Additionally, during this meeting, Velaz, the founder, left the organisation. He left the Assembly with a sense of achievement. FyA had expanded, was serving a cause, and more importantly, because it was the first time that FyA had an international identity (former secretary (Federation), 2016 - Interview).

Although the principles were constructed collectively over three years, it took one more year for ten countries to approve and ratify it. This happened on November 10, 1985 in San Salvador, El Salvador (secretary (Federation), 2016 - Interview). Thirty years after FyA's inception, members of different countries shared a set of minimum conventions. Interestingly, during this Assembly the idea of having a permanent institution re-emerged "*It is my view that not having Velaz also contributed to this, as he was the one mostly resisting the idea*" (former secretary (Federation), 2016 - Interview). Discussions centred on the need to respect national autonomy and to have a body to facilitate knowledge sharing among members. Finally, a federative model and an institution named "The International Federation FyA" were proposed (PGDFI I, 2000)<sup>28</sup>.

Discussions concerning the purpose, objectives and structure of the "Federation" continued over a year and were officially considered on November 1, 1986 in Cochabamba, Bolivia. The federative model was seen as the most appropriate for six reasons. First, members thought that a federative style could group the movement in one body. Second, the federation as the resulting institution could ensure that all members follow the established principles. Third, as a federation, all members could contribute and receive resources. Fourth, a federative style encourages national autonomy and collective action at the same time. Fifth, a federative style promotes representation and dialogue between members. Lastly, having a permanent institution could contribute to bridging FyA as a whole with international institutions without duplicating efforts (secretary (Federation), 2016 - Interview). The decision was unanimous and was presented as the first statute of the International Federation (PGDFI I, 2000).

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<sup>28</sup> Plan Global de Desarrollo y Fortalecimiento Institucional 2001-2005.

After ratification of the federative model, the most contentious issue was the design of a functional structure. Members agreed on having three different layers (PPDF I, 2000). In a top position, as maximum authority, was the “General Assembly” which was comprised of the national directors of all countries, one delegate by country and the president of the Latin America Conference of Jesuits<sup>29</sup>. The major objective of the “General Assembly” was to guide FyA strategically (former secretary (Federation), 2016 - Interview). In addition, the “General Assembly” would have the objective of establishing International Congresses for constant reflection on FyA’s purpose (Reglamento de la Federación – funciones 1 a 9 (FIFyA 151/2003)). In a second layer representing the executive role, directors agreed on having an “executive board” consisting of five members to ensure that countries follow the policies adopted by the “General Assembly” (Reglamento de la Federación – funciones 1 a 9 (FIFyA 151/2003)). Finally, at the operative level, directors decided to have a “coordinator” of the “Federation”. Several rounds of reflections indicated the need to move away from a “president”, as such a title implied someone governing the rest and the main responsibility of that person was to coordinate action (former secretary (Federation), 2016 - Interview). Given the scarcity of FyA’s resources, members decided that each of them would have the role of “coordinator” on an annual rotation.

Between 1986 and 1991, the federative activity was defined by the need to put into practice the proposals contained in the principles subscribed in 1985. This was a phase of deep reflection and assimilation of the fundamental orientations (PPDF I, 2000). Finally, from 1992 to 1999, federative activity focused on finding specific actions that could help tackle marginalisation, injustices and poverty in Latin America (International Coordinator (Federation), 2016 - Interview). Figure 3.8 summarises the process of constructing a participatory structure for multilevel action.

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<sup>29</sup> This representative was seen as primary due to the links with the support to FyA of the Society of Jesus.

*Figure 3.8 The federation route*



#### 3.6.4.2 Reaching the invisible excluded: The network of radio stations

**Poverty problem:** With lower levels of growth and higher levels of debt, most of the governments executed drastic cuts in social welfare (Bertola and Williamson, 2017) This new scenario brought to light the problem of educating prisoners and other marginalised individuals never covered by the government or private institutions, such as adults with no knowledge or skills for the workplace. - Velaz took a fresh -look at the existing resources. In his words, “*when one wants something seriously, one is capable of overcoming mountains of problems, and even difficulties become stimuli*” (1984)<sup>30</sup>.

**Response:** Thinking outside the box

**Organisational context:** Due to massive constraints in public and private funding across Latin America, FyA actors started to develop new solutions to educate the poor. One of the most unusual but probably the most successful one was having radio stations that could bring education massively and employ fewer resources. This idea emerged from two simultaneous albeit isolated processes.

First, Velaz had always been passionate about finding ways to bring education to all types of poor, not only to children as schools did (Velaz, 1974)<sup>31</sup>. Back in the early days of

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<sup>30</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

<sup>31</sup> J. M<sup>a</sup> Vélaz, “Fe y Alegría en la educación a distancia (Caracas, 13 febrero 1974)”, AFA. Escritos del P. Vélaz, s/n.

FyA, reaching a massive number of people was not an easy task. However, Velaz saw in the radio a way to expand FyA without putting more pressure on the already deprived schools. In his words, *“If Fe y Alegría was born on a ranch, the radio would allow us to convert each ranch into a school”* (Perez Esclarin, 2010, p. 197). Looking for educational radio experiences, Velaz travelled to Colombia in 1962 and studied the case of “Radio Sutatenza”, a project managed by Father Salcedo, a Colombian priest. Salcedo’s radio offered educational programs for farmers with strong emphasis on crops and housing issues. The process of finding experiences continued slowly as the schools and the expansion of FyA occupied most of Velaz’s time. Only seven years later, while in Spain, Velaz discovered “Radio ECCA” a cultural broadcaster in Islas Canarias, Spain. He was amazed by the station’s innovative educational program, as it complemented radiophonic classes with books and personalized assistance once per month (Velaz, 1985)<sup>32</sup>. For Velaz, the already operating network of schools in Latin America could offer classes at night or on weekends to provide education for most of the illiterate adults living in the slums or for those who had abandoned their studies (Perez Esclarin, 2010).

Second, national directors of Bolivia, Guatemala and Panama had experienced roles in Jesuit radio stations before joining FyA. In the case of Bolivia and Panama, both Jesuits in charge of FyA knew its benefits in terms of coverage and impact (Perez Esclarin, 2010). In this regard, the radio played a significant role in some Latin American countries during the 1960s and 1970s, as Jesuits used it to spread the word of Christ. However, the option of radios to provide education only emerged in 1973, at the annual meeting in Cochabamba, Bolivia (former national director of Bolivia, 2016, ethnographic conversations). Here, the directors concurred that special emphasis was needed to educate all types of poor and marginalised. After several exchanges of experiences, they concluded that the radio could help in this endeavour.

However, the project of having radiophonic education in FyA only materialised in the early 1980s. The first country to start the initiative was Venezuela. The new “Instituto Radiofonico FyA - IRFA” had a clear aim: to offer access to education each semester to people from the age of 15 at primary, high school and complementary levels (Saez, 1999).

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<sup>32</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

For Velaz, the FyA movement could alleviate poverty not only by empowering children but also by meeting the learning needs of adolescents and adults who could not study in conventional ways (Lazcano s.j., 2013). Although IRFA started with classes from primary to high school, it found that most of the people preferred the complementary courses. By 1992, IRFA was providing classes in carpentry, masonry, electricity and knitting. One of the most popular broadcasters was located in Guasdalito (East Venezuela) and reached nearly 25.000 inhabitants. In the words of Velaz (1985)<sup>33</sup>, “*we need to provide people with small tools that allowed them to insert [themselves] productively in the society*”. The foundation of IRFA in Venezuela cannot be reduced to another project of Velaz. It was spawned from the same idea and objectives to empower the poor in order to be agents of change. As such, radiophonic education not only filled the gap that the schools could not address but made members of FyA aware that tackling poverty was a process of diverse initiatives aimed at diverse social actors.

Inspired by the success in Venezuela, other FyA countries started their own initiatives. The radio soon became FyA’s medium to provide education to many without exclusion by race, age or gender (Perez Esclarin, 2010). The fact that one simple broadcast could reach multiple homes, restore people’s dignity and contribute to reducing geographical distances was a reality beyond imagination (Velaz, 1985)<sup>34</sup>. The next country to adopt the radio as an educational tool was Ecuador, followed by Bolivia and Paraguay. In each country, the radio served specific purposes. For instance, in Paraguay, it was used in penitentiaries. The idea was to provide a mean to reintegrate prisoners into society. Courses not only aimed to develop skills but also to inculcate values (Federacion Internacional Fe y Alegria, 1999). In the case of Ecuador, radiophonic education focused on technical education complemented with some centres offering additional training (National director, 2016- Interview).

By 1996, the national directors of Ecuador, Paraguay, Bolivia and Venezuela signed the “Declaration of Santa Cruz (Bolivia)”, a compendium that summarized the role of the radio in distance learning. In the words of the former director of IRFA Venezuela (2016-

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<sup>33</sup> Cartas del Masparro. Compilación de Carmelo Vilda S.J.

<sup>34</sup> *Ibíd.*

Interview), “*Constructing the radio has been a continuous process of reflection in which have discovered that empowering the marginalised is not only about standardize knowledge. It is also about culture, values, skills and building bridges to insert them in the society.*”

### 3.6.5 STAGE THREE: Tackling new frontiers of poverty from the 2000s to the present

3.6.5.1 A complete portfolio: Social promotion programs aiming at the marginalised and excluded minorities.

**Poverty problem:** The beginning of the new century brought many changes to Latin America, among the most important of which is the change in the interpretation of poverty. Although backtracking this change is difficult, it became most apparent at the end of the 1990s when new discourses moved poverty from a purely economic phenomenon to a socio-political one (Prados de la Escosura, 2007). This new conceptualisation of poverty emphasised the marginalisation of various categories of social actors. Poverty then reflected systemic and historical issues regarding inequality, social exclusion—and the attendant lack of opportunities. Illustrative cases include the struggles for the rights of the disabled, women and ethnic minorities.

**Response:** Deploying complementary actions.

**Organisational context:** During the beginning of the 2000s until 2017, FyA moved gradually to analyse complementary problems that social actors experienced in their communities. Through a long process of reflection, the organisation’s history was evaluated and questioned. Although FyA had been offering formal and technical education, most of the communities still experienced high levels of undernourishment, broken families, social violence and exclusion of specific actors. This situation pushed the organisation to find novel ways to transcend the walls of the classroom and help the wider community, resulting in two main actions (PGDFI I, 2000; PPDF IV, 2015).

The first action explains how FyA members have included the community more formally in the construction of agendas and visions for development, with discussions focused on the needs of the community and ways to improve it. As a result, several projects of social

development have emerged. They are seen as ways to learn about life and the world by establishing social and natural relations. From 2000 to 2016, FyA developed four federative strategic plans that pay special attention to nutrition, health and citizenship construction (PGDFI I, 2000; PPDF II, 2005; PPDF III, 2009; PPDF IV, 2015).

In the case of nutrition, eight countries (Bolivia, Colombia, Ecuador, Nicaragua, Paraguay, Peru, Dominican Republic and Venezuela) incorporated projects in which national FyAs provided nutrition advice to students and their relatives based on available food sources in their regions (PPDF I, 2000; PPDF II, 2005; PPDF III, 2009) (former national director of Bolivia, 2016 - Interview). Most of these projects had an interactive component in which each community created its own local orchard. In some projects, such as the “Yachay Wasi” (Indigenous language for house of knowledge) in Bolivia, the idea has flourished, and some centres sell their surplus to other communities (Project manager one (Bolivia), 2017 - Interview). Finally, some of the nutrition projects have also been linked to projects about the transformation and conservation of the food produced. This is the case of the schools in Sucre, Bolivia; where the local authorities provide milk and students produce cheese and yogurt with the leftover milk (Project technician four (Bolivia), 2017 - Interview). Since their inception, these projects have benefited nearly 120.776 inhabitants (Fe y Alegria, 2016).

Another notable idea that has emerged is the culture of peace and the construction of ethical citizens (Fe y Alegria, 2008; PPDF IV, 2015). These projects have underscored the importance of dialogue, negotiation and construction of socially desirable values (Federacion Internacional Fe y Alegria, 2016b). FyA holds annual international congresses with varying thematic focuses. However, since the congress XXXI in 2000 to the XLVI in 2016, there has been a special focus on improving social participation in political and social activities (Fe y Alegria, 2008<sup>35</sup>; Fe y Alegria, 2016). Stemming from these international discussions, nearly 350 projects have been developed to address drug abuse, lack of aspirations, domestic violence, sexual abuse and child exploitation (secretary (Federation), 2016 - Interview).

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<sup>35</sup> Pensamiento de Fe y Alegria: Documentos de los Congresos Internacionales (2008).

To elaborate on this widened scope of FyA activity, we briefly present the following three examples. First, there is the project “*Culture of peace: A Carnival of Values*” in FyA Colombia (2016). This project aimed to respond to various forms of violence in the city of Cartagena, with particular attention to violence against women. Second, FyA Guatemala, in alliance with OXFAM, has designed the project “*Prevention of violence in the school through the inclusion of the community*” (2017) (Fe y Alegria Guatemala, 2017). Its objective is to prevent violence by educating social actors in the art of dialoguing and negotiating social concerns. A final project is the “*Democratic coexistence and culture of peace in schools*” in Fe y Alegria Venezuela funded by Inditex (2016). The principal goal of this program is to reduce the violence in the schools in Caracas and the State of Lara through the inclusive and interactive involvement of the students, their families and the educational community.

The second main action undertaken by FyA relates to tackling the discrimination confronted by social actors with cognitive and physical disabilities when trying to get access to education (Fe y Alegria, 2008). Although this concern has been raised at the federative level, three countries are ahead in providing inclusive education as well as raising awareness in the community (Project manager two (Spain), 2017 - Interview). For instance, FyA Bolivia has more than 16 years of experience dealing with education for the blind and the deaf. To do so, it has created six centres of special education and adapted 47 schools to incorporate inclusive policies (former national director Bolivia, 2016 – Interview). Among the multiple actions taken, FyA Bolivia has trained teachers in sign language and included audiobooks and Braille books among its curriculum materials. Throughout the years, FyA Bolivia has served nearly 1.137 individuals (Federacion Internacional Fe y Alegria, 2012, 2013, 2016a). The second country with a long history in this regard is Venezuela. Here, special attention has been given to provide a high school for deaf students. The only school adapted for this purpose is located in the “Institute of Phono Audiology Juan Pablo Bonet” in Caracas (Fe y Alegria Venezuela, 2012)<sup>36</sup>. In 2012, FyA Venezuela had the joy of graduating its first 16 students with an administrative degree; by 2012 the school had 114 students (Fe y Alegria Venezuela, 2012)<sup>37</sup>. The final

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<sup>36</sup> Fe y Alegria Venezuela (2012) <http://old.feyalegria.org/libreria/portal.php?caso=5&id=1064> (Retrieved 16<sup>th</sup> December 2017)

<sup>37</sup> *Ibíd.*

successful case is that of Ecuador. A centre in Santo Domingo de los Tsachilas (the poorest area of Ecuador) has been established to educate children with cognitive disabilities (Entreculturas, 2014)<sup>38</sup>. In a project funded by the Inter-American Bank of Development (BID) in 2011, FyA Ecuador implemented the use of technology and trained its teachers to use the new technology effectively. At the end of 2012, the centre served 223 children with different cognitive disabilities.

To summarise, in terms of innovation and reflection, the first years of the 21st century have been a fruitful period (Fe y Alegria, PPDF III, 2009). Core postulates such as “*where the asphalt ends*” to signify the fight against poverty have been put under constant reflection, leading to ideas to address other forms of exclusion (Participant Observation, Lima 2016; Colombia 2016; Spain 2017 and Brazil 2018).

#### 3.6.5.2 Going to Africa: Other places can learn from our experience and create their own paths

**Poverty problem:** The absence of education for most of the population is the common rule in Chad, Madagascar, RD Congo and Guinea. People of various ages, genders and demographic profiles are illiterate. Since governments cannot sustain public investment, rural areas are left behind in terms of development.

**Response:** Translating previous experiences.

**Organisational context:** In contrast to Latin America where Catholicism has penetrated all social levels, Chad is traditionally Muslim. With nearly 75% of the population illiterate and 77% residing in rural areas (UNESCO, 2017)<sup>39</sup>. Chad was chosen by friends of FyA (namely the Society of Jesus) to establish a pilot scheme in Africa (Entreculturas, 2011)<sup>40</sup>. The place selected was the Southern region of Guéra and its capital Mongo. The pilot scheme involved providing education through eight existing community schools (Project manager for Africa, Spain 2017 - Interview). The success was immediate. By 2008, the

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<sup>38</sup> Fe y Alegria Ecuador (2011) <http://www.bidinnovacion.org/es/iniciativa/3/fe-y-alegria> (Retrieved, 8<sup>th</sup> of December 2017)

<sup>39</sup> UNESCO. <http://uis.unesco.org/country/TD> (Retrieved 20th of October, 2017)

<sup>40</sup> Entreculturas <https://www.entreculturas.org/noticias/fe-y-alegr-chad-growing-roots> (Retrieved 5th of November, 2017)

network had grown to 18 primary schools and a high school for the zone began. The Federation provided support and FyA Venezuela sent a commission to share experiences. However, among different experiences, the one that was perceived as the most significant was the school as the heart of the community (Project technician for Africa, Spain, 2017 - Interview). In rural and marginalised areas of Chad, there is a strong sense of community (former project manager for Africa, Spain, 2017 - Interview). Thus, the school was considered as a place in which the local people could participate actively in the construction of desirable values (Project manager for Africa, Spain 2017 - Interview). Furthermore, the concept of having an actual school has promoted ideas of solidarity, collaboration and diminished the social gap between women and men (Project technician for Africa, Spain, 2017 - Interview).

***Figure 3.9 Fe y Alegria Chad – Women education initiative***



Source: Entreculturas (2016).

Developing FyA in the context Chad has not been an easy task, as the government is reluctant to provide economic aid beyond the wages of some teachers (Observation strategic meeting, Brazil, 2018). However, through international assistance and the collaborative effort of the community, FyA Chad can report three major achievements in ten years. First, in 2015, 15 schools of FyA were opened in Tchelat and Madgoro. These schools, like the ones in Mongo, provide a centre for community engagement. Second, FyA has managed to introduce programs in joinery, mechanics and sewing for adults.

Empowering adults is seen as a way to take children out of the labour force and give them access to education. Finally, FyA Chad, with the assistance of the Federation FyA, has started a training program for teachers. The main aim is to expose them to some successful experiences in popular learning based on Paulo Freire's "*Pedagogy of the Oppressed*" (former national director Chad, 2016, interview).

After the success in Chad, FyA expanded to Madagascar. This time, a Jesuit priest who knew about Velaz's work in Latin America introduced the idea to the provincial. Officially, FyA Madagascar was established in 2013, but it was not until 2014 that the operation actually began operation (Project manager for Africa, Spain 2017 - Interview). Currently, FyA Madagascar operates in three impoverished regions: Solila, Mandigi e Ikalamavony (former project manager for Africa, Spain, 2017 - Interview). Similar to Chad, Madagascar's experience appropriated what was perceived as meaningful from the Latin American practice. This resulted in the adaptation of the programs for teachers training and primary education. Looking retrospectively, we can see that the pedagogical program provided an identity construction as well as a strategy to work in small networks (former national director Madagascar, 2016 - Interview). The case of primary education emerged as a major concern in a society where nearly 62% of the population is between 0 and 25 years, and 94% of this percentage is illiterate (UNESCO, 2017)<sup>41</sup>.

Finally, the cases of FyA RD Congo (2015) and FyA Guinea (2016) resemble the ones in Chad and Madagascar in three aspects. First, their constitutions are attributable to Jesuits familiar with Velaz's work or FyA in Latin America. In this sense, the expansion of FyA to Africa could not be possible if FyA had not had links with the Society of Jesus. A long history of the Jesuits in these territories allowed the use of their capabilities and as well as the good will of the Society of Jesus. Second, in both cases, countries have taken what is considered as desirable or has conditions of possibility for adaptation based on the Latin American experience. For instance, in the case of FyA Congo, priority was placed on primary education, whereas FyA Guinea has focused on technical education. Lastly, FyA has been conceived not only as a project that can aid in alleviating poverty, but also as a place for community interaction. For example, in FyA Guinea, technical education

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<sup>41</sup> UNESCO. <http://uis.unesco.org/en/country/mg> (Retrieved 20th of October, 2017)

projects strive to address the community's needs. Recently, students in Sobanet started an environmentally friendly brick moulding enterprise that aims to reduce the high use of wood in house construction. Among several projects searching for donors, one of the most promising ones involves making batteries using sea salt to develop a small plant that can provide electricity for the community.

### **3.7 Discussion: Dealing with the changing manifestations of poverty**

We found that FyA responded in seven ways to manage the dynamic complexity associated with poverty over a 60-year period. 1) Working with social actors to find and articulate solutions; 2) using constraints to create opportunities; 3) iterative action; 4) engaging in multilevel actions and creating participatory structures, 5) thinking outside the box; 6) complementary actions, and 7) translating experiences to new contexts. We observed that each response played a particular role over time and that some of them build upon previous experiences. In theoretical terms these responses extend the notions of collective action and distributed experimentation.

On the one hand, Olson (1965) defines collective action as the process of coordinating acts among different individuals to further a common interest that could not be achieved independently. Conceptually collective action responses include working with social actors to find and articulate solutions, engaging in multilevel actions, and creating participatory structures. On the other hand, distributed experimentation is defined as the process that generates small wins whilst promoting evolutionary learning and engagement (Ferraro et al., 2015). Responses extending distributed experimentation are thinking outside the box and translating experiences to new settings. In the following section we explain how collective action and distributed experimentation address issues around the dynamic complexity associated with wicked problems.

#### *3.7.1 Collective action*

Traditionally, collective action has referred to the processes that individuals experience when coordinating action to achieve a goal that is impossible to attain otherwise (Olson, 1965). The existing literature has studied collective coordination either using incentives (Knoke, 1988; Ostrom, 1990) or in social contexts (Wasko and Faraj, 2005; Wiertz and de Ruyter, 2007). According to these studies, collective action emerges when individuals

align expectations or create a sense of membership. We extend extant knowledge explaining how collective action can contribute in dealing with dynamic complexity in Table 3.3.

**Table 3.3 Collective action responses and dynamic complexity associated with wicked problems**

Response	Wicked problem dimension	Brief speculation
<i>Working with social actors to find and articulate solutions.</i>	<i>Solutions to wicked problems are not right or wrong but good or bad.</i>	<p>Father Velaz was able to start tackling poverty as he managed to find and articulate solutions with different social actors. Through his visits to slums and interactions with several actors, education emerged as a solution for poverty. This idea provided a sense of purpose involving different social actors. Overall, the voices of multiple actors (e.g. nuns, students and parents) provided the bases for the construction and operation of FyA’s schools.</p> <p>The case also illustrates that responses to tackle poverty are neither right nor wrong but <i>must</i> include the affected—in this case, the poor. A common feature in failed approaches to wicked problems is the tendency to overlook some actors, diminish representation and silence voices with the argument that one knows better what the path of the “solution” is.</p>
<i>Engaging in multilevel actions and creating participatory structures.</i>	<i>Wicked problems have no stopping rule.</i>	<p>In this case, FyA members overcame the problem of exhausting resources by engaging in multilevel actions and participatory structures. Since no one could alleviate poverty by working alone, there was a need to share resources. Thus, tackling wicked problems necessitates multilevel action and the principles of cooperation and collective work.</p> <p>Second, there was a need to clarify preferred definitions of poverty and potential responses. To do so, the international federation was created, operating as a participatory structure. The federation provided a setting to work collectively, devise policies, orient future work, and support each other. In this scenario, having a federative structure also allowed changes in leadership and facilitated FyA actors in dealing locally and internationally with notions of poverty.</p> <p>Third, as the problem never ends, actors need to find small wins. Given the creation of the</p>

		Federation, actors could share responsibilities for FyA's operation. This aligns with a form of decentralised action in which people complement each other, controlling resources and avoiding double work.
<i>Complementary responses</i>	<i>Every wicked problem can be a symptom or consequence of other problem.</i>	<p>In this case, as the problem changed and there were multiple explanations, FyA actors devised different types of solutions to tackle the problem in several flanks. Moreover, FyA actors understood “<i>there was no solution that fit all poverty symptoms or causes</i>”. Importantly, these responses were complementary to the existing ones whilst strengthening previous action.</p> <p>For instance, FyA actors created and implemented projects related to gender issues, violence, disabilities and indigenous inclusion. These projects, in turn, resulted in a relatively strong arsenal of responses to tackle poverty.</p> <p>By adopting a multipronged strategy to tackle poverty, FyA started to view the problem holistically. This approach helped raise issues around marginal improvement and changed actors' orientation to high-level problem formulation.</p>

### 3.7.2 Distributed experimentation

Given the complexity, uncertainty and stakeholder conflict associated with complex problems, actors must find ways to create small wins whilst learning and adapting to the context (Ferraro et al., 2015). According to De Young and Kaplan (1988), as cited in Ferraro and colleagues (2015), when experimentation is distributed, it is possible to find alternative solutions simultaneously. The process of distributed experimentation clarifies how complex problems can be better understood through iteration and continuous learning. In Table 3.4 we explain different types of responses that contribute when dealing with dynamic complexity.

**Table 3.4 Distributed experimentation responses and dynamic complexity associated with wicked problems**

<b>Response</b>	<b>Wicked problem dimension</b>	<b>Brief speculation</b>
<i>Iterative action based on previous experiences</i>	<i>No immediate and ultimate test of a solution exists.</i>	Any response will never be an ultimate solution, as it will always have unintended consequences. Thus, the only way to avoid developing a fatalist view that leads to inertia is by accepting small

		<p>wins. Here, iterative action is crucial. It is understood as a systematic and recursive process: i.e., the repetition of actions that have already achieved small wins.</p> <p>In this case, the expansion to Latin American countries can be considered as an iteration of the foundational experience of Caracas, Venezuela. Here, FyA actors aimed to educate the forgotten. In all the countries, each school covered the “poorest of the poor”. Moreover, the Velaz project inspired others to address dire socioeconomic realities in other countries. Interestingly, education provided short- and medium-term outcomes that could contribute to evaluating “success”. The small wins not only encouraged engagement but also attracted new members.</p>
<p><i>Thinking outside the box</i></p>	<p><i>There is no definitive formulation of a wicked problem</i></p>	<p>As there will be always incomplete information of the problem, causes and consequences, actors need to explore non-conventional responses. In this case, the radiophonic experience of FyA illustrates that when actors think outside the box, they can find alternative responses to improve the comprehension of the wicked problem. The radiophonic experience started as a way for FyA to reach the previously unreachable poor in remote areas.</p> <p>By understanding other types of poverty, actors gained a deeper understanding of poverty and its constituents. For instance, it included notions of exclusion by age (e.g. young adults who had never finished school and could not access any work).</p> <p>Through this process, FyA actors not only uncovered marginalised and abandoned actors, but they also found alternative solutions based on existing technology, such as the radio. It was an existing device used for other purposes, yet it became an ally to reach the poor who did not fit under the FyA schools’ response.</p>
<p><i>Using constraints to create opportunities</i></p>		<p>Although wicked problems are unique, through the three examples of Chad, RD Congo and Guinea, we see that responses used in Latin America can be translated to different settings. In this case, translation does not mean repetition but identifying a problem, selecting specific previous responses and adapting them to local contexts for future evaluation.</p>
<p><i>Translating experiences</i></p>	<p><i>Every wicked problem is essentially unique</i></p>	<p>Although wicked problems are unique, through the three examples of Chad, RD Congo and Guinea, we see that responses used in Latin America can be translated to different settings. In this case, translation does not mean repetition but identifying a problem, selecting specific previous responses and adapting them to local contexts for future evaluation.</p>

		<p>For instance, FyA in Latin America had technical programs for adults and formal education for children. In the case of Chad, children were working to help sustain their families. A translation of the technical program and the formal education helped empower adults and lifted children out of the labour force by giving them the opportunity to go to school. Similarly, another translation experience occurred in the case of Guinea. Latin American FyAs had projects in masonry and carpentry. The translation of masonry projects contributed to finding housing solutions for the town of Sobanet by using mud and clay.</p>
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### 3.8 Implications

In dealing with a wicked problem, managing its changing manifestations is a complex endeavour. Most often, actors exhaust resources without solving the problem or disengage as time passes. The objective of this study was to uncover *how organisational actors tackle a wicked problem that never ends*. These findings offer valuable information for management practice that shed new light when researching wicked problems.

#### 3.8.1 Implications for management research

Alternative ways of organising and wicked problems. The study starts to unpack issues around collective action inside the organisation and with other actors to tackle wicked problems. These findings highlight three important aspects. First, in alignment with collective action literature (see Bennett and Segerberg, 2012), we illustrate the importance of creating participatory structures to avoid disengagement with the wicked problem. More specifically, we demonstrate how certain structures (i.e. federative) enhance participation, as evidenced by the fact that different actors construct richer responses to tackle a problem.

Second, we extend previous efforts to explain the importance of including the affected in the solutions of wicked problems. For instance, Mische (2014) studied how actors addressed climate change. In her study of the Rio + 20 debates, she found that a key starting point in the process of deliberation was the inclusion of all possible actors starting off with the affected ones. Although including the affected has been a major concern in initiatives for tackling climate change, this is a largely under-researched aspect of

complex problems (George et al., 2016). These findings suggest that including the affected when defining the problem provides a multidimensional and inclusive understanding of the problem and opportunities for further engagement.

Third, this case also reinforces the need to operate at multiple levels when tackling wicked problems. In FyA's case, actors operated at the levels of school, city, country and federation. Moreover, they also operated at the multilateral level with donors and other organisations that engaged in similar activities. Multilevel working has been conceptualised as a key factor in adaptation (Dattée and Barlow, 2017) and collective feedback (Knudsen and Srikanth, 2014). Thus, in dealing with the changing manifestations of wicked problems, organisational actors can avoid the burden of double work and the misuse of resources and can learn from each other.

*Problem solving and wicked problems.* The study underlines the importance of improving our understanding of problem solving in complex situations. In this sense, the findings highlight two overriding points. First, when dealing with the changing manifestations of wicked problems, using constraints as opportunities is effective in designing responses. More specifically, perceived limitations may prompt us to take a fresh look at resources or to unlearn what is known (Brook et al., 2016). In this case, the radio was never used to teach people; however, after some tests, FyA actors were able to use their creativity to tackle other types of poverty. These findings suggest that robust action (Ferraro et al., 2015), including distributed experimentation, may be a benefit of looking at how actors perceive constraints and how these perceptions foster responses to wicked problems.

Second, although each wicked problem is unique (Rittel and Webber, 1973), our findings suggest that previous responses perceived as “impactful” can be translated to other settings. For instance, in the case of African countries, some Latin American projects, such as technical education for the adults, were translated based on contextual needs. This practice resulted in empowered adults and increased school attendance among children. The translation of responses plays two significant roles. On the one hand, when responses are successful, translation provides the sense of a small win needed to continue tackling the problem (Ferraro et al., 2015). On the other hand, translation is important to understand how an impact can be measured in organisational settings. It should be recognized that although there is no ultimate solution for wicked problems (Rittel and

Webber, 1973), organisational action is guided by goals achievement. Translating experiences may provide a guiding image of activities that contributed in other contexts (George et al., 2016).

### **3.9 Future research on Organisations and wicked problems**

The objective of this study was to explore how organisational actors deal with a problem that never ends. We used a case study to provide some insights into the phenomenon. However, in order to move beyond our analysis of wicked problems, future research could delve into issues pertaining to representation and collective sense making: two areas required for action as well as the processual understanding of dealing with dynamic complexity.

*Organising for wicked problems.* Further research on wicked problems may benefit from an exploration of the following two interwoven topics. First, there is a need to better understand how interpretations of a problem converge and diverge in organisations (Vaara et al., 2016). Researchers could investigate how different actors come together and why some voices are left behind in the constructions of responses to wicked problems. However, of greater importance is what type of objects enhance actors' convergence. Another promising avenue of research is a closer look at polyphony, which is understood as how multiple voices come together without being merged into a dominant one (Bakhtin, 1985). An attendant area of future research is the linguistic objects that facilitate such a process.

Second, organising for constant adaptation also points to the need to theorize further sense making processes. Whereas previous research has studied sense making as a retrospective phenomenon, wicked problems reveal central issues about collective sense making and future-oriented sensemaking processes that are worth exploring.

*Developing a process-based understanding of managing dynamic complexity.* Current research has been vital in understanding issues associated with wicked problems in a process way. For instance, Reinecke and Ansari (2016) provide a model that explains how actors cope with value conflict based on how the meaning of a wicked problem is framed and interpreted. Similarly, Camillus (2008) offers a model to understand how organisational actors manage knowledge uncertainty. Thus, an important line of future

research will be the process through which organisational actors manage constant adaptation to the changing manifestations of wicked problems. This is relevant for process studies in which change is not an outcome but an integral part of the process. By perceiving change as a part of the process and not its outcome, we can better grasp how actors learn, adjust, unlearn and respond to wicked problems in real time. A process-based understanding of the management of dynamic complexity is also useful to understand how actors manage time. This, in turn, results in furthering understanding of the interplay of “colliding temporalities” (Reinecke and Ansari, 2015) and actors’ needs and aspirations (George et al., 2016) when tackling wicked problems.

## **Chapter 4 Mapping expectations about the future in strategy making: Alleviating poverty in a networked organisation**

### **4.1 Abstract**

A growing body of research on prospective sensemaking has indicated that organisational actors use expectations to make sense of the future in entrepreneurial and change processes. However, studies of expectations occurring in strategy-making processes remain rare. To understand organisational actors' expectations about the future in strategy making, we investigated the formation of expectations in the world's largest educational non-profit network: The International Federation Fe y Alegria (IFFyA). Based on narrative accounts, our analysis reveals three distinct types of expectations in planning responses to alleviate poverty. These expectations reflect different temporal orientations, involve various narrative forms, and influence the perceived openness of the future for action. In addition, we explore the interplay of these different expectations in nine multi-country projects aimed at tackling poverty. Our contribution is twofold. First, we propose a more nuanced account of temporal agency in sensemaking processes. Second, we further current understandings of why organisational members struggle with temporal work by showing that composite narratives do not necessarily translate into composite expectations. Our theoretical insights have significant implications not only for current theory on sensemaking, but also for research on strategy making and narrative organising.

**Keywords:** Expectations, narratives, prospective sensemaking, strategy making, time

## 4.2 Introduction

Strategy making encompasses the processes of planning and communicating organisational strategy (Balogun et al., 2014). These processes are crucial for organisational performance and survival (Kaplan and Orlikowski, 2013). Strategy making is a formidable endeavour, one that involves dealing with forward-oriented thinking and power dynamics (Kaplan and Orlikowski, 2013). Furthermore, past research has demonstrated that *sensemaking*—understood as the social process of meaning construction about the organisational context (Gioia and Chittipeddi, 1991)—is crucial to our understanding of how managers engage in strategy making (Balogun et al., 2014; Cornelissen and Schildt, 2015; Rouleau and Balogun, 2011).

According to the existing research, managers undertake strategy making by using prospective sensemaking under ‘*future perfect thinking*’ (Weick, 1979, p. 198), that is, as if the future had already occurred (Pitsis et al., 2003). By thinking of completed actions, managers construct and communicate a strategy to other members who would then enact it. However, recent reviews of sensemaking (Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015) suggest that a closer look at sensemaking’s temporal orientation—mainly the future—may provide a more detailed account of strategic processes. Whereas sensemaking through future perfect thinking privileges a retrospective lens (Sandberg and Tsoukas, 2015), some researchers have questioned the validity of such sensemaking processes under conditions of ambiguity and uncertainty (MacKay, 2009). Recent studies have suggested that most of the strategy making in organisations unfolds through organisational members’ expectations about the future, which occurs in prospective sensemaking processes (Stigliani and Ravasi, 2012). Moreover, the research has revealed that strategy making is not only undertaken by managers, but also by members of different layers of the organisation (Kaplan and Orlikowski, 2013; McGivern et al., 2017). Thus, further investigation of sensemaking processes is warranted. More specifically, we need to examine how members’ expectations about the future are formed and how they affect strategy making. This avenue of research could shed new light on how strategies are co-constructed and why some strategies may be enacted, and others resisted.

That said, a major limitation of previous studies is that they have been conducted in traditional and hierarchical organisations, ‘in which sense is literally “given”, or handed

over by managers to employees (Cornelissen and Schildt, 2015, p. 365). Therefore, moving away from ‘asymmetrical’ organisational models could add new dimensions to our knowledge of how members’ expectations are formed and how they influence the ‘construction of joint meanings...[that can] stick’ (Cornelissen and Schildt, 2015, p. 365). To address these concerns, we focused on an international religious-based, non-governmental organisation (NGO) that operates as a network of independent nodes. In contrast to hierarchical organisations, networks involve a series of members’ interdependencies where authority is distributed (Stark, 2009), accountability is lateral, and strategizing is multidimensional (Girard and Stark, 2003). Our case study is the ‘*International Federation Fe y Alegria*’ (IFFyA), the world’s largest, non-profit NGO network dedicated to providing education services to impoverished communities. In operational terms, IFFyA is organised into one international secretariat coordinating subsidiaries in 21 countries (16 Latin-American, 2 European and 3 African), all of which operate independently. Due to the multiplicity of members’ concerns and the complexity of the social contexts in which IFFyA operates, members experience numerous challenges when strategizing. Hence, IFFyA offers the perfect setting to explore expectations in strategy-making processes.

Our analyses centre on IFFyA members’ expectations about the future to alleviate poverty and on subsequent processes when expectations meet in strategy making. Our set of data comprises 130 semi-structured interviews with members from all organisational levels. We also gleaned relevant data from archival documents and ethnographic observations of strategic meetings. This robust, multi-faceted data set facilitated an examination of different members’ expectations and impacts on IFFyA’s strategy. Our analysis followed a narrative approach, allowing the explanation of expectations through narrative accounts that link events with experience (Bruner, 1991). According to our findings, IFFyA’s members vary in their expectations about how to reduce poverty. We identified three types of expectations that align with Emirbayer and Mische (1998, p. 964) agency conceptualization as a social and temporal embedded process “oriented toward the past, the future, and the present at any given moment”. First, we encountered expectations privileging a schematisation of the past. We also identified expectations about interconnected and flexible futures favouring an imaginative engagement with social

structures. Finally, we determined expectations about a future based on present practical evaluation and privileging practical judgment.

Our contribution to prospective sensemaking scholarship is twofold. First, we propose a more nuanced account of temporal agency in sensemaking processes. This furthers Sandberg and Tsoukas' (2015), together with Maitlis and Christianson's (2014) calls for investigating different kinds of prospective sensemaking. In doing so, we contribute to the debate on agency (Emirbayer and Mische, 1998), specifically on the temporal orientation of intention and the formation of expectations about the future. Therefore, our study shows that actors' expectations about the future are constructed in different ways. Second, we incorporate the analysis of expectations into the analysis of "temporal work" in strategy-making processes (Kaplan and Orlikowski, 2013), thus furthering our understanding of why organisational members struggle with temporal work. We demonstrate that temporal work might be a collective illusion insofar as composite narratives do not necessarily translate into composite expectations. The implication of our findings is that strategy making must consider the interplays between "*composite narratives*" and how '*multiple expectations meet in time*'.

### **4.3 Theoretical background**

#### *4.3.1 Sensemaking and strategy making*

Sensemaking has been theorised as a process of meaning construction through plausibility, focused on the extraction of cues to interpret what is happening, what has happened or what will happen (Cornelissen, 2012; Maitlis and Christianson, 2014; Weick, 1995). Strategic processes are an example of such processes of meaning construction that trigger sensemaking (Sandberg and Tsoukas, 2015). Sensemaking occurring in strategy making follows a variety of forms, thus reinforcing different understandings of the past, the present and the future (Cornelissen and Schildt, 2015). For instance, as noted by Gioia and Chittipeddi (1991) and Rouleau and Balogun (2011), strategic plans are inherently about the future insofar as there is a need to make sense of what is not yet there (Balogun and Johnson, 2004). It can be argued that sensemaking is an essential process in strategy making, as organisational members need to create meaning to enact their social worlds (Maitlis and Christianson, 2014).

The extant literature on sensemaking has concentrated on two main perspectives: the cognitive and the social processes of meaning construction. According to the cognitive perspective, sensemaking results from the construction of a relationship between cognitive frames and cues (Daft and Weick, 1984; Starbuck and Milliken, 1988). Weick (1995) defines cognitive frames as past moments that are recollected, eventually creating mental models, whereas cues are present moments of experience. Cognitive frames (the past) are useful for explaining how the context (the present) is understood and for creating visions of the future through actors' elaboration of scenarios (Cornelissen and Schildt, 2015). The elaboration of future scenarios that resemble transpired events is known as "*future perfect thinking*" (Weick, 1979, p. 198)

'*Future perfect thinking*' draws on Schutz's (1967) idea that the future can be better understood when individuals think about it as if it has already occurred. As such, the envisioned future results from retrospective cycles of meaning construction (Stigliani and Ravasi, 2012). In terms of strategy making, future perfect thinking helps actors project a specific outcome while showing the path to achieve it (Comi and Whyte, 2017). This reduction of ambiguity legitimates the desired future, while providing certainty for action (Weick et al., 2005). Despite its practical relevance, few studies have addressed '*future perfect thinking*' empirically (see Pitsis *et al.*, 2003; Fuglsang and Mattsson, 2011 for exceptions). Theoretically, however, researchers have noted that a major shortcoming of '*future perfect thinking*' is that frames used by actors to imagine the future will inevitably resemble the past (MacKay, 2009). Consequently, actors may fall into the '*Icarus paradox*'—that is, with our attention focused on the familiar, changes are left unnoticed in the present (Bluedorn, 2002).

From the perspective of the 'social processes of meaning construction' (Balogun et al., 2014; Kaplan and Orlikowski, 2013; Maitlis and Christianson, 2014; Rouleau and Balogun, 2011), sensemaking concerns the collective construction of meaning. This perspective implies a shift from the individual to group dynamics, in which sense is not retrieved but constructed collectively (Cornelissen and Schildt, 2015). These constructions are the result of how actors link the past, the present, and the future based on rhetorical, conversational, discursive or narrative practices (Gephart et al., 2011; Maitlis and Christianson, 2014). By focusing on these links, researchers have discovered

less radical ways to deal with strategy making. For instance, Lê (2013) argues that planning for more ambiguous collective future scenarios creates expectations of flexibility for strategic action. Kaplan and Orlikowski (2013) suggest that actors' "temporal work" can lead to a plausible, coherent and acceptable narrative that legitimates a particular account for strategic action. In other words, actors' articulation and agreement of temporal links provide strategic certainty for acting.

Both perspectives of sensemaking have contributed substantially to the uncovering of temporal aspects in strategy-making processes. However, despite its practical relevance, sensemaking's future orientation remains largely under-researched in the strategy-making process (Cornelissen and Schildt, 2015). Various issues are overlooked, including the interplay between expectations and human experience (Konlechner et al., 2018), together with how organisational groups conceive the influence of time and temporality on strategy making (Balogun et al., 2014).

#### *4.3.2 Prospective sensemaking and expectations about the future*

Prospective sensemaking broadly refers to imagining a desirable future state (Gioia and Mehra, 1996). In this process, expectations defined as future-oriented material or rhetorical abstraction that guides action and activities (Borup et al., 2006) play a pivotal role. Serving as a source of temporal coordination, expectations provide desirable links between the past, the present and the future (Borup et al., 2006). Moreover, as a source of social coordination, they connect with cues to create social meanings that enable actors' mobilisation (Maitlis and Sonenshein, 2010).

This view of expectations underscores human agency as a dialogical process, with others or oneself immersed in the experience of time to organise action (Emirbayer and Mische, 1998). Additionally, this perspective highlights Mead's (1932) notion of '*hypothesization*': the past and the future are inaccessible and can be reconstructed only hypothetically. The dialogical construction involves efforts to deal with an immediate future (anticipation) as well as with larger social trajectories (projection) (Tavory and Eliasoph, 2013). In both processes, actors not only interpret but also create meaning for acting in the social world (Tavory and Eliasoph, 2013). Therefore, expectations are

instrumental in explaining actors' conceptions of the possible and impossible as desirable future states (Beckert, 2016; Meretoja, 2018).

Recently, scholars have focused on expectations and prospective sensemaking processes to explain various organisational concerns. For instance, Gephart et al. (2011) assert that expectations of projected entities are crucial to our understanding of what becomes seen as potentially real. In the context of entrepreneurial legitimation, Garud, Schildt and Lant (2014) argue that expectations do not need to be either true or false. Instead, in order to be accepted, they only need to be more or less "meaningful" or "robust" in the eyes of the stakeholders. In the context of strategic change, Konlechner et al. (2018) demonstrate that expectations influence actors' tolerance for dissonant cues.

To summarise, previous studies have provided valuable insights into expectations in prospective sensemaking. More specifically, these studies have shown the role of expectations in bridging experiences and the social world at both individual and collective levels. This particular feature of expectations may help clarify how organisational actors engage in sensemaking in strategic processes (Cornelissen and Schildt, 2015). In this paper, we further the conversation by addressing two questions. First, how are actors' expectations about the future formed when planning responses to tackle a wicked problem? Second, how do different expectations about the future influence strategy making?

#### **4.4 Methodology**

Using an open-ended and inductive research design that was informed by a broad interest in the role of the future in strategy making, we studied the '*International Federation of Fe y Alegria*' (IFFyA), an international non-governmental organisation devoted to combatting poverty through education.

##### *4.4.1 Research Setting: The International Federation of Fe y Alegria*

'*Fe y Alegria*' (FyA) was founded in 1955 by José Maria Velaz, a Jesuit priest, in the outskirts of Caracas, Venezuela. Nowadays, it is a satellite organisation of the Jesuits, who are still responsible for its management locally and globally. Through the vehicle of education, the organisation strives to improve the lives of each individual, his or her social

contexts and the wider society. In this sense, FyA embraces the spirit of ‘*popular education*’ as defined by Paulo Freire in *Pedagogy of the Oppressed*, his seminal, most influential work. Operating today in 21 countries, FyA runs approximately 2.500 schools, attended by more than 1.5 million students (Federacion Internacional Fe y Alegria, 2016a). While most of its schools are in Latin America (16 countries), FyA has a growing presence in Africa (3 countries) and Europe (2 countries).

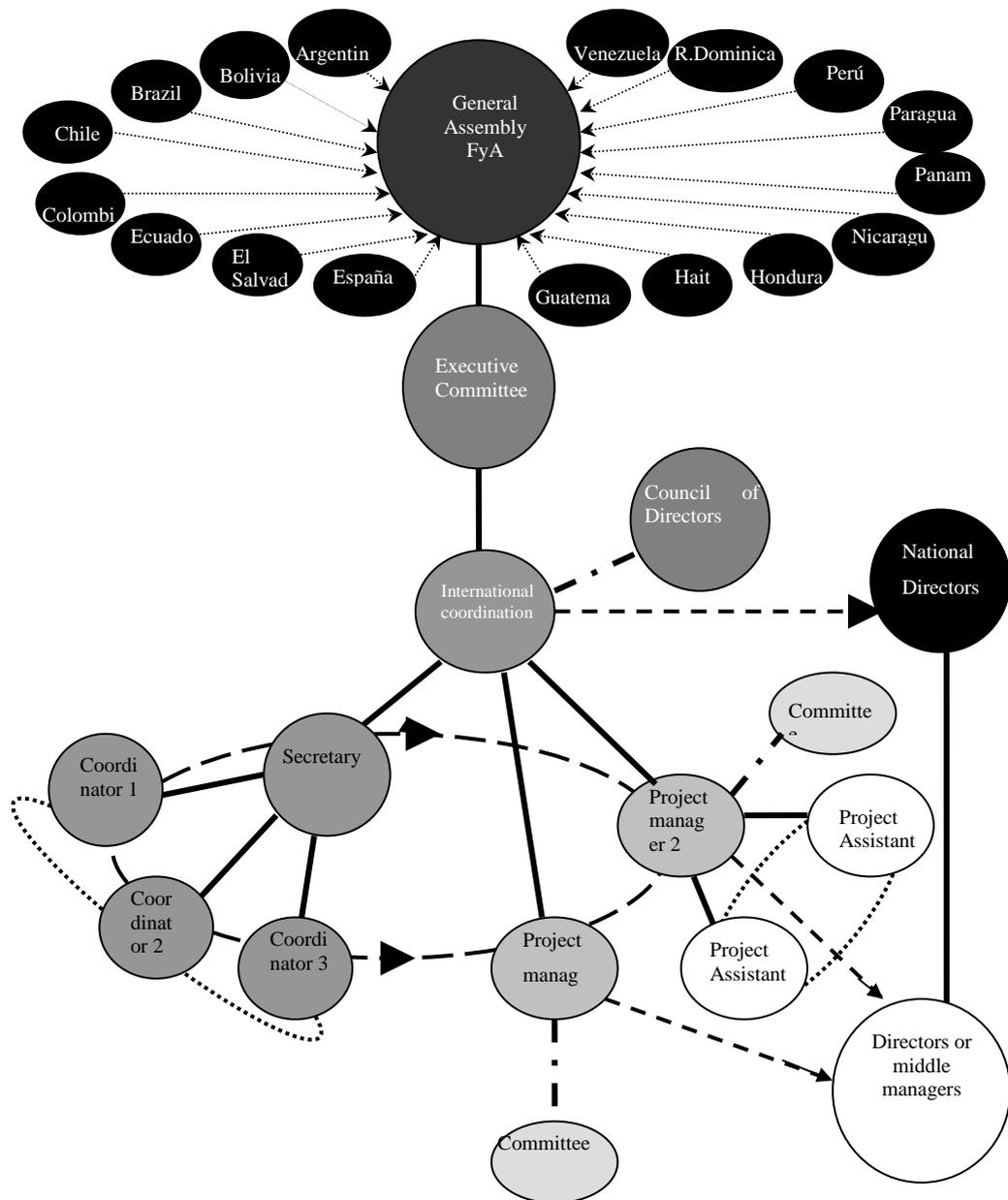
IFFyA was established in 1987 after the existing national autonomous subsidiaries realised that tackling poverty requires a collective effort<sup>42</sup>. In organisational terms, IFFyA’s 21 national subsidiaries are fully autonomous. Given the diversity of contexts in which each subsidiary operates, IFFyA has no authoritative body or hierarchy. Structured around international and often virtual teams, with shared decision making and governing, IFFyA operates as a network. Since 1990, its members have delineated five-year strategic plans for the federation. These plans set visions and policies to take on the grand challenge of poverty alleviation through common projects, which are then funded by development agencies and private corporations.

Figure 4.1 illustrates IFFyA’s network structure of a General Assembly and International Coordination. As none of the previous bodies has formal power over the 21 autonomous subsidiaries, IFFyA is an extremely pluralistic collective organisation in which diverse perspectives on how to confront poverty converge and conflict on a daily basis. Thus, IFFyA constitutes the ideal site for exploring how different organisational members engage in future-oriented sensemaking for strategy making. Our case is made even more relevant by the fact that the organisation targets the wicked problem of poverty. Since poverty is a complex phenomenon, with varied and highly contextualised ways of manifesting itself, there is no ‘one-size-fits-all’ solution. This fact adds another layer of complexity to strategy making sensemaking processes.

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<sup>42</sup> <http://www.feyalegria.org/es/quienes-somos/historia>

*Figure 4.1 Fe y Alegria's federative structure*



#### 4.4.2 Data collection

Through interviews, documents and ethnographic observations of strategic meetings, we collected data on the strategy making of a federative strategic plan. These sources provided a diverse set of expectations about the future, allowing us to investigate the process through which future expectations are formed as well as their impact on strategy making.

***Interviews.*** Using semi-structured interviews, we captured individual perspectives and expectations about the future. Interviews were included because of their ability to integrate lived experience, present concerns and future desires (Frey and Fontana, 2005). Between 2016 and 2018, we interviewed 130 members of IFFyA in five countries: Bolivia, Colombia, Ecuador, Paraguay and Spain. To capture a wide spectrum of voices and viewpoints across IFFyA, we used purposive sampling. Our sample included national directors (N=11 out of 21), middle managers and deputy managers in the five visited countries (N= 58 out of 122), and employees working with the international federation in the aforementioned countries (N=61 out of 80).

These interviews followed a common protocol for all members (Brinkmann, 2013). Interviews were recorded and focused on each member's role in the organisation, involvement in strategic processes and problems encountered during strategy making processes. Additionally, notes were taken throughout the interviews, all of which were conducted in Spanish and lasted from 45 minutes to two hours. Recordings of the interviews were transcribed and entered into NVivo.

***Ethnographic observations.*** In conjunction with the interviews, researchers observed 65 strategic meetings, such as board meetings and project workshops in six countries (Brazil, Colombia, Ecuador, Paraguay, Peru and Spain) over the duration of two years (2016 - 2018). Researchers also visited the schools and other contexts where IFFyA operates, including the remote and highly complex social contexts of El Chaco, Paraguay, and extremely poor neighbourhoods of Lima, Peru.

During the observations, which covered periods from 5 to 18 days, the researchers spoke informally with IFFyA members from all organisational levels, including the students and their parents. (The researchers participated in two parents' meetings.) Throughout the ethnographic observations, the researchers shared accommodation and all daily activities with IFFyA's members. This level of embeddedness in the world of our respondents facilitated a deeper understanding of their positions, backgrounds, and roles (Van Maanen and Kolb, 1985). We also took field notes about developing events and strategic and operational problems (Spradley, 1980). These observations allowed us to perceive IFFyA members' diverse expectations in the field and to follow the design and implementation of the strategic plan's projects.

**Documents.** In addition to our ethnographic observations, we collected former strategic plans, memos, strategic presentations, email exchanges, public documents and financial and operational reports. These authentic documents provided insights into the organisation's plans and their assessments. As a consequence, we gained insights into IFFyA's strategic and operational pressures. The documents also helped corroborate members' accounts and trace discussions about previous strategic projects.

#### 4.4.3 Data Analysis

Our theory building was inductive, open-ended (Strauss and Corbin, 1998) and achieved in four phases. Furthermore, the analytical process was highly iterative, covering multiple rounds of coding and relevant literature. Given the triangulation of the analysed data, we could deepen our evaluation of the events and situate the expectations about the future in the place of lived experience and memory recollection (Bruner, 1991; Meretoja, 2017, 2018).

**Step 1 - Mapping differences among members.** Our analysis began during the fieldwork. After the preliminary analysis of our copious notes, it became apparent that IFFyA members varied widely in how they perceived the future. Their comments also revealed stark differences in how they understood the alleviation of poverty. Once the fieldwork finished, we created a data set in NVivo and organised the data from our ethnographic observations and interviews chronologically and by country. After this step, we clustered respondents' answers around members' roles in the network. We identified three types of organisational members who experience distinct realities and occupy a unique position at the interface of at least two IFFyA worlds.

The first cluster consists of Catholic priests (Jesuits) and nuns, the latter from various religious orders. They operate at the nexus of the Catholic Church and IFFyA. While the Jesuits manage most of the national FyAs subsidiaries, the nuns either teach classes or manage individual schools. The second category of members is comprised of lay managers and directors. Closer to IFFyA's diverse contexts, these managers have first-hand knowledge and experience of the organisation's daily operations and liaise between IFFyA and its local schools. Finally, we have the project managers and project technicians, most of whom are located in Bogota, Colombia, and Madrid, Spain. This

group operates at the interface of IFFyA and the private and public donors who finance its global projects. Project managers usually formulate projects and oversee their global implementation for international agencies. By mapping the activities of these three groups of actors, we could recognise the particularities of each type of member while linking their unique characteristics to their understandings of how to diminish poverty.

***Step 2 - Classifying different expectations about the future and first round of coding.***

Looking at our clusters of members, we noticed that they varied significantly in terms of their expectations about the future and their definitions of poverty and how to alleviate it. Initially, we used respondents' words to differentiate expectations about the future and then combined those words with similar meanings. As a result, three types of expectations emerged. (They will be discussed in greater detail in section 4.5, under "Findings".) We categorised them as follows: expecting the future to be a "*destination*" (a place to be reached), expecting the future to be a "*challenge*" (several parallel futures happening in connected ways), and expecting the future to be a "*pilgrimage*" (the future as a cyclical construction based on contextualisation and problematisation of experience). Then, to explore how these expectations were formed, we focused on the narratives used by the actors. Narratives were understood as "*the general or inclusive term for a story or account of events or experiences, fact or fiction, long or short, detailed or plain*" (McArthur, 1992). This emphasis allowed us to gain access to systems of meaning that are unavailable through other collection methods (Rhodes and Brown, 2005; Rhodes and Pullen, 2009).

We concentrated on narratives for four reasons. First, although they are usually understood in retrospective terms (Boje, 2011), narratives not only account for past experiences but also offer an imaginative dimension that helps explain the range of options for actions or inactions that actors envisage and scrutinise in practice (Brockmeier, 2015). In this sense, narratives have the exploratory power "*for meaning, for direction, for what makes life worth living*" (Meretoja, 2018, p. 75). They provide a limitless vision of what is not yet there. Second, narratives are particularly valuable to explain events occurring over time, linking facts and imagination (Bruner, 1991). Hence, expectations about the possible and impossible can be more deeply understood through narrative forms (Meretoja, 2018). Third, narratives shed light on the processes by which

actors interpret and construct meaning that sustains and shapes the social world (Currie and Brown, 2003), thus rendering narratives a meaningful tool for grasping sensemaking processes at the individual and collective level (Brown et al., 2008; Currie and Brown, 2003). Finally, narratives have the capacity to embody and transmit individual and collective accounts of experience (Bakhtin, 1985; Boje, 1995). To analyse the various narratives, we followed the suggestion of Gioia et al. (2012) to develop first order analysis. For instance, we labelled respondents' fragments, such as "*daily struggles*" or "*paths to be walked*", into the first order code of "*plots of the story*". Similarly, we combined fragments such as "*the project gives us a north star*" and "*what does God want from me?*" into the first order code of "*narrative beginning*".

### ***Step 3 - Second round of coding and delving into members' narrative constructions.***

In this phase, we grouped first order codes following narrative analysis into second order themes, such as narrative forms, narrative orientations and future openness. Then, we paid particular attention to our second code themes and their relation to the *chordal triad of agency* (Emirbayer and Mische, 1998). As a result, we unveiled three distinct types of expectations related to specific notions of intention and temporal orientation. This crucial phase enabled us to understand the strategic impacts emerging from conflicting expectations in the field.

To grasp the impacts in a processual manner, we walked backwards and analysed nine strategic projects using our codes. The outcome was the discovery of two types of expectations that interplay during strategy making. First, there is a process that we refer to as '*expectations contestation*'. During this process, some members could not relate to the expected future presented by the project. This lack of connection resulted in a covert resistance that fragmented the unity of IFFyA. The second type of expectation or process is what we call '*expectations confluence*'. Different members' expectations meet "in time", bound by events, goals or perceived benefits. This process generated the misconception that settling a strategic account for action could lead to the coalescence of different members' expectations about the future.

### ***Step 4 - Final round of coding: relating expectations to intention and strategy making.***

In this step, we refined our theorisation and established the links between our findings

and the current literature. To do so, we paid particular attention to concepts that do not seem to have adequate theoretical referents (Gioia et al., 2012), as exemplified by the diverse ways of making sense of the future and its constructions based on narrative characteristics. In this regard, we see that prospective sensemaking for planning can take three forms: iterative (based on the past), practical (based on the present) and projective (based on the future) (Emirbayer and Mische, 1998). These forms of prospective sensemaking vary according to the temporal orientation of intention. Furthermore, we documented the influence of having conflicting expectations about the future in strategy making. Our work offers a more nuanced account of temporal work, as we demonstrate that members who covertly resist an expected future that does not align with their expectations often undermine it.

## **4.5 Findings**

### *4.5.1 The expectations about the future to alleviate poverty in IFFyA*

In this section, we present the three types of expectations we encountered at IFFyA for making sense of the future when planning responses for poverty alleviation: first, expecting the future to be a “*destination*”; second, expecting the future to be a “*challenge*”; third, expecting the future to be a “*pilgrimage*”. These expectations varied in terms of how members connected events and presented them as a narrative (*narrative forms*), how they made temporal links across the past, the present and the future (*narrative orientation*), and how they faced the possibility of change in the future (*future openness*). Table 4.1 summarises each type of expectation.

**Table 4.1 Type of expectations found in Fe y Alegria**

ELEMENTS / EXPECTATION ABOUT THE FUTURE AS...	A DESTINATION	A CHALLENGE	A PILGRIMAGE
MEMBERS ROLE - POSITIONS IN THE NETWORK	Members working at the federative level and public/private donors	Members working at the interface of the federation and local environments (schools)	Members working at the interface of the federation and the Catholic Church
MEMBERS' RESPONSIBILITIES IN THE NETWORK	Design projects for the 21 members.	Link the project to national and regional strategic and operative plans.	Managing schools of FyA.
	Apply for funding with development agencies.	Implement the projects in the field.	Link the project to national and regional strategic and operational plans.
	Evaluate implementation of projects	Allocate local resources for projects.	Implement the projects in the field.
TEMPORAL ORIENTATION OF INTENTION	<i>Privileging the past:</i> Using past experiences to tackle poverty through projects. Emphasis on what has worked in the past to deal with the future.	<i>Privileging the future:</i> Using imagination to tackle poverty through initiatives. Emphasis on departing from the past to imagine new futures.	<i>Privileging the present:</i> Using problematisation and reflection to tackle poverty. Emphasis on the lived experience and encountered problems to adapt short-term action.
NARRATIVE FORMS	<i>Screenplay:</i> Highly descriptive; characters and goals known.	<i>Nonlinear narrative:</i> Disjointed stories focused on experiences without chronological order.	<i>Quest:</i> Describes the desire to do something while narrating what is being seen and discovered.
NARRATIVE ORIENTATION	<i>Linear:</i> The past, the present and the future are a sequence of events.	<i>Non-linear:</i> A series of evolving networks that focus on future relevance. The future is a collective construction that requires imagination.	<i>Cyclical:</i> An eternal loop for questioning and understanding what is going on.
FUTURE OPENNESS	<i>Future as planned:</i> Small room for the unexpected. Future is fixed.	<i>Future as flexible:</i> Accounting for the unexpected.	<i>Future as a question:</i> Constant question of meaning.

**1. Expecting the future to be a “destination”: Privileging the past.** One group of organisational members, consisting largely of project managers and project technicians, expected the future to be a “*place to be reached*” in which poverty would be alleviated. When planning strategic responses, this group usually considered goals and sequences to achieve them. For example, project manager Rocio argued: “*We establish, at the beginning of the year, clear objectives and goals to be achieved...Generally, we have very good results.*” As a project manager with a background in Engineering and Business Sustainability, Rocio joined FyA after volunteering for a year for a Spanish NGO. Her typical day begins by envisioning what type of projects can be developed for the different FyA subsidiaries and how funding can be secured. At the time of our interview, she was

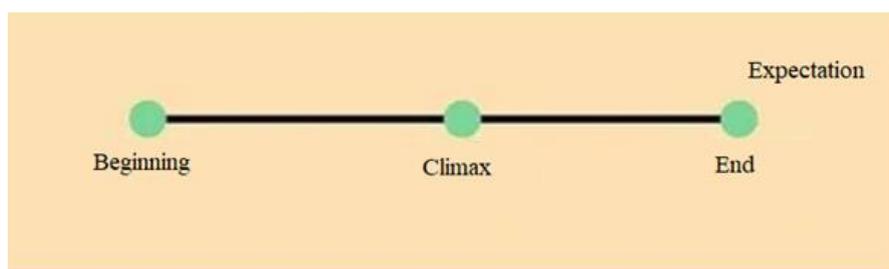
considering the design of projects on gender and agricultural education. When engaging in fundraising activities, Rocio starts by contacting previous corporate donors and asking them about their Corporate Social Responsibility (CSR) agendas. She then gathers some information about donors' interests and 'Skypes' her team to consolidate a proposal for the potential donor. During calls, she also enquires about the progress of current projects. Finally, she oversees official evaluations that her office conducts every six months. Rocio's days are very similar: she plans, evaluates and fundraises.

When comparing narratives of project members' efforts to fulfil expectations, we found two common activities. First, the members designed specific projects that could be sold to development agencies. They used clear measures and objectives that they deemed adaptable to the majority of countries. For instance, project manager Dario noted: "*We have a project of technical education that we operate right now in 17 countries...After several years of work, we have identified the diverse components of the technical education...and how its management should be done.*" In a related vein, Ernesto, another project manager, reported: "*Our team works in parallel. While some people focus on project planning, prioritising and specifying, others seek public and private donors.*"

Second, project managers oversee the implementation of projects, a task that relies heavily on past experience. To illustrate, project technician Helena commented: "*We plan monthly and try to coordinate with all the centres in which we have a project...That is the way that has been successful to achieve results.*" This notion of the future underpinned the previous strategic plan. As project manager Andrea highlighted: "*We said the [federative] plan must have SMART [specific, measurable, agreed upon, realistic and time based] strategic objectives; each project must have its own strategic objectives...We used the same approach for the first and second [federative] plans.*"

The interviews with project managers and technicians revealed a uniform narrative construction that explains their expectations about the future vis-a-vis plans to tackle poverty. Such consistency is threefold. First, these organisational members built a narrative around a screenplay as if confronting poverty requires the following of a script with specific instructions and characters. Second, they revealed a linear orientation towards time. Third, they expected the future to resemble what had been originally planned. Figure 4.2 illustrates how narratives shaped the expectations of these members.

**Figure 4.2 Narrative construction of the “destination” expectation**



1.1 Narrative form: Screenplays. Most of the responses of project managers and technicians resemble lines of highly scripted screenplays where the sequences, endings and the characters were known, leaving room only for delivering what was written. This pattern over-emphasized the importance of achieving the expected outcome. As project manager Rosa elaborated: *“It has helped our work all these years that we started by establishing clear goals...we use our plan to guide our action...we have established which schools we want to work with...how many recurrent donors we aim for.”* This comment is followed by making sense of the sequences needed to reach the “destination”. Project technician Vanesa offers an illustration: *“Let me give you an example. I formulate the project, and then I have calls or emails with the directors of the countries to ask them who is going to participate in the project. When things are approved by the donor, I send the information...Then they implement, and I verify.”* Curiously, for these members, the future could be transposed from one place to another. As project manager Wilmar explained, *“Future projects in different countries can use the ‘packs’ we have designed. We have detailed proposals about what to do; it provides a sequence of actions to get results.”*

In addition to sequences and endings, characters were carefully considered. Members stated the overriding need to make sense of the “who”. For example, project technician Claudia stated: *“With my team, we have long meetings in which we construct the project together. We know who is involved and how...it would not work otherwise.”* Or as project manager Pilar put it, *“I know the teams of each school... we [project members] developed the annual plan stating who is the responsible for each action...we know the activities that are ongoing...it gives us control.”* In sum, making sense of sequences, endings and characters provided members with a “camino” (“path”) (Project manager Rocio) that gets them to their destination. However, when these features are ambiguous, members have problems dealing with their expectations. For instance, project technician Sandra

asserted: *“I found the idea behind the new [strategic] plan highly disturbing...Directors have changed too much, and this plan is like a blank sheet. How do we start, with whom and where do we want to go?”*

1.2 Narrative Orientation: Linear. Based on the written “screenplays”, it was easy for members to describe the future as a linear association between the past, the present, and the future. For example, project manager Ernesto explained: *“When designing the project, we project results, activities; then we follow what is planned, and when it finishes, we measure.”* For some members, temporal linearity was an obsession. As project manager Rocio argued, *“We are called the weird people because we want to make sure that sequences and activities provide the results we want.”* This linearity was acknowledged as the *“forma de hacer las cosas”* [i.e. “way of doing things”: authors’ translation] by project manager Dario when describing projects results. Similarly, in the words of project technician Pilar, *“If you have planned accurately...you should not have unexpected results; and if you have them, it is learning that you must use for the next one.”* The notion of linear thinking also emerged when some members imagined new projects or new futures. For instance, project manager Simon commented: *“What we usually do is to think about how the new project is connected to the previous one. We rarely start something totally new...The work of FyA is to have educational proposals for which we need continuity.”*

1.3 Future Openness: Future as planned. As a result of having highly scripted and linear time sequences, expectations about the future hardly ever change. In the words of project manager Helena: *“Look how I wrote a project about technical education with specific activities in technology and production for the following months...everything is so detailed... the person that takes it will barely need to think about something else.”* Having everything planned with no room for the unexpected is recognised by members. As project manager Rosa stated, *“Year by year we plan. Our plans have a small room for thinking about the unexpected, and I have to admit that we see problems only after measurement.”* This situation can give rise to several issues. For example, project manager Simon noted: *“I have to say that most of our problems are solved on the go, as when we plan, we usually think about the right thing to do rather than the ‘what if’”.* However, losing the ability to make sense of the unexpected is not seen as problematic.

As project manager Rocio explained, *“At the end, what matters is that we achieve what we planned.”*

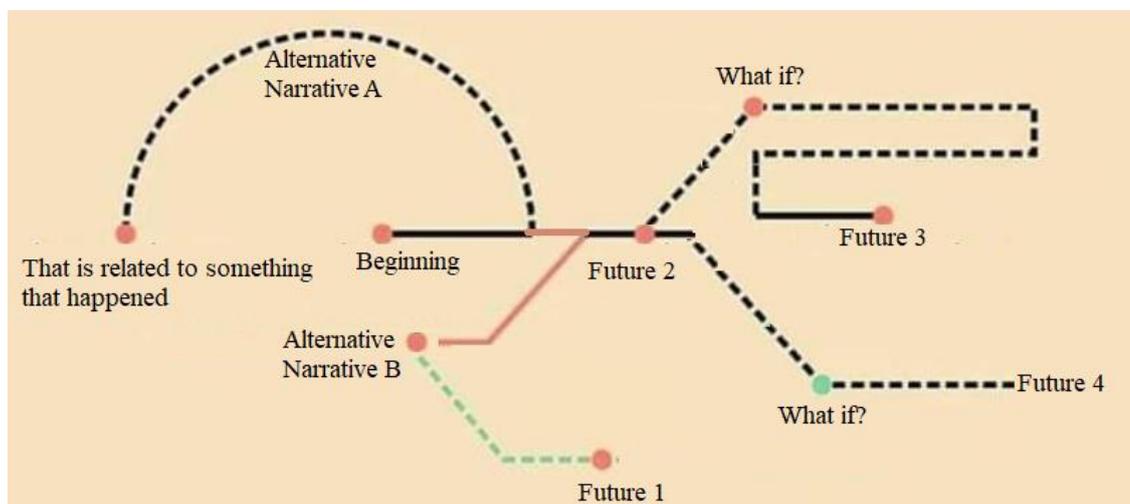
**2. Expecting the future to be a “challenge”: Privileging imaginative engagement with social structures.** Another group of organisational members, most of whom are lay national directors and middle managers, expected the future to be an “unavoidable challenge” in tackling poverty. National directors and middle managers are in charge of linking the projects with national and regional activity. In contrast to project managers, they are near the areas where projects are implemented. They also manage the resources for the schools’ regular operations and assist in the evaluation of plans and projects. To perform these tasks, they need to diversify actions and think creatively about social changes. When planning strategic responses, instead of focusing on one end result, members focus on parallel futures, imagining solutions that depart from what is known. As Valeria, a middle manager in South America, put it, “Fighting poverty is about being innovative, thinking outside the box.”

Unlike the clearly delineated expectations of other groups, the expectations and narrative constructions of the lay national directors and middle managers are messier, more complex and highly dependent on externalities. For instance, Eduardo is a National Director in Central America. He is responsible for one FyA that is implementing projects on gender, technical education and a culture of peace for young gang members. Eduardo claims that his days rarely follow what he had planned. In his words, the only thing that is the same *“is the 25 minutes that he has to drive from his house to the national headquarters”*. In addition, Eduardo emphasises the duality of his position: *“I am national director, and I am also a member of the Federation.”* As Eduardo finds it difficult to describe a typical day, he replied by describing his responsibilities: *“You asked me about how a day of work looks like for me. Let me tell you better what I do in both of my positions as I have to deal with the outside and think about how I can contribute to improve it.”* According to Eduardo, most of his daily work is surrounded by diverse actors: *“I can have a lot of talks with my four coordinators...I can visit the local and regional schools...I can have meetings with private donors for the local operation...I can have meetings with representatives of education from the [city] and the [region].”* In his

concluding remarks, Eduardo points out: *“I don’t have normal days...I usually spend most of my day... finding ways to improve our social reality.”*

The interviews with lay national directors and middle managers revealed similar narrative constructions for their expectations about the future. Overall, tackling poverty is about non-linear narratives that privilege the imagination and create temporal links focusing on future relevance and always leaving space for the unexpected. Figure 4.3 illustrates how narratives form the expectations of these members. We expand below.

**Figure 4.3 Narrative construction of the “challenge” expectation**



2.1 Narrative form: Non-linear. Non-linear narratives are disjointed narratives in which the author portrays events from experience without following a chronological order. For example, Carmen, a regional director, noted: *“My work is to contribute to the poor. So, when thinking about the future, I have to think about multiple nows.* In a similar line of reasoning, middle manager Rogelio commented: *“Working for 12 years at Fe y Alegria has shown me two things: You need to live one day at time, and no day is like the previous.”*

Non-linear narratives can form one narrative if they converge in a specific context. As a result, meaning can be achieved. For instance, middle manager Lucrecia asserted: *“My work [regional coordinator] has taught me that you need to speak with several actors...that you need imagination and adaptation at the frontier [reference to working at the ‘frontiers of poverty’], otherwise you cannot handle the social reality.”* The need

to acknowledge other narratives is also expressed by middle manager Jesus: *“If you want to promote change you have to speak with the people, identify the topics that link us and act.”* This line of reasoning was used for national directors when asked about changes they would propose for the upcoming strategic plan. National manager Hernan commented: *“What I imagine is that each Fe y Alegria should decide its own path, when, how and with whom... We have to be able to go beyond what we have done.”*

2.2 Narrative Orientation: Non-linear. The respondents classified in this group referred to the future as a system of evolving networks and interconnections. This group has a dual role in that part of their work is targeted to the contexts in which FyA operates, while the remaining is devoted to collaborative work for the federation. This duality leads them to two different understandings of the future simultaneously. As an example, middle manager Valeria, referring to her work in the federation, said: *“Future in the federation is a complex question because we are a network of dissimilar organisations aiming most of the time at different results.”* Conversely, Alejandro, a middle manager, referred to his work along the following lines: *“As director I need to find imaginative solutions... I have to speak with my team... I have to be able to think something different.”* As a result of forming expectations based on networks and interconnections, when members make sense of the future, they do it in an imaginative way. For example, middle manager Rogelio argued: *“We have consolidated our proposal in some places, but our job is to project to new places... Our movement reaching Africa is a good example.”* Similarly, manager Gustavo asserted: *“We need to rethink how education can... change our social reality; we need to imagine dynamic things in a society that changes but for the worse.”*

2.3 Future Openness: Flexible - Accounting for the unexpected. Most of the narratives of this group suggest the need to reserve space for the unexpected. As middle manager Rogelio commented: *“Life is not simple... we cannot comprehend everything.”* According to middle manager Pedro, *“Fighting poverty always requires you to be open to the unexpected... our responses should include different scenarios as most of the time we are dealing with many problems in one.”* Similarly, Valeria commented: *“I think our processes need more room for unexpected events, like when you dance salsa or samba... I mean that our processes need better adaptation. We can't be rigid.”* A recurring point was the need to be flexible. As manager Gustavo put it, *“In many things we have to*

*change our chip. We need to sensitise people with these dynamics...our processes can't continue based on the idea that because it worked in the past. In our contexts, we can't continue with this mind-set."*

**3. Expecting the future to be a “pilgrimage”: Privileging practical judgement.** A final group of members expected the “future” to be like a “pilgrimage”. What is important is not the end, which is unclear, but the act of simply moving forward. Pilgriming is open-ended and refers to the continuous practice of contextualising and problematising experience. This group is composed of Jesuit national directors and Catholic nuns serving as school directors. In contrast to the previous group, when planning strategic responses, these members place a higher priority on analysing experience as the foundation for future thinking.

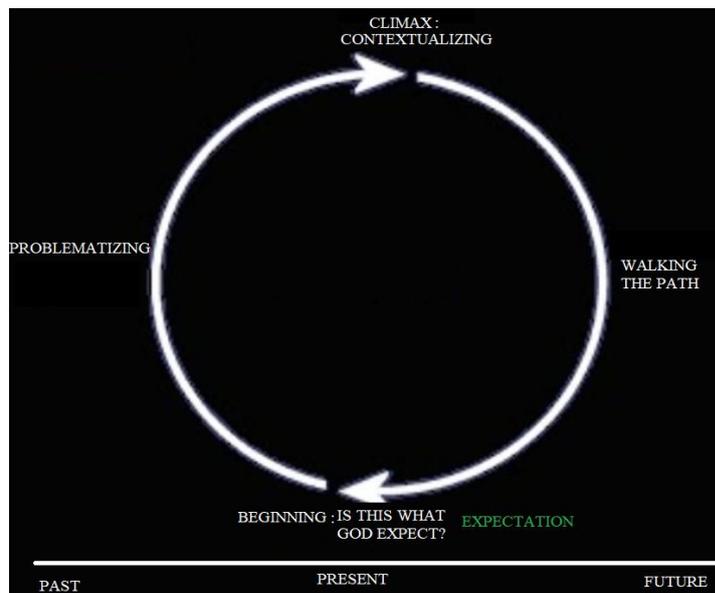
The story of Juan provides a useful example. Currently, stationed in South America, Juan is a Jesuit (hereafter SJ) from Spain with 30 years of experience working with the marginalized. He uses his faith as a guide to deal with the challenges he encounters in his work. Juan SJ claims that *“he has to be cautious in his work”* as FyA must consider many social problems involving marginalized and impoverished communities. His typical day starts with a morning prayer or a morning mass. During his prayers, he asks himself, *“What does God want from me?”* This question allows Juan SJ to meditate about *“the real experience of life”* and how he can *“walk to the Kingdom of God”*. He follows this practice when visiting FyA schools: *“What does God want from these kids and the education we provide?”* Or when he has meetings with unfamiliar people: *“I prepared myself today for your interview and I meditated on how you and your team can help Fe y Alegria.”* The rest of his days are filled with meetings with his coordinators, meetings to evaluate their work and make necessary improvements to fulfil their mission. When the day finishes, Juan SJ does the *“daily examination of conscience”* (a Jesuit routine of examining the day before going to bed): *“I come to the end of the day, and I recall what I have done today, what type of contacts I have had; I ask if I am doing what God expects from me, what has been my advancement today and what I have learned today for tomorrow.”*

The contextualisation and problematisation of experience via Jesuit practices is also acknowledged by other members. For instance, Alvaro SJ commented: *“Things change,*

and that is something I need to discover through the exercises [mention to the *Spiritual Exercises*, characteristic of Jesuit identity]—*what is the will of God for today? So, I can prepare for acting...*” In a similar line of reasoning, Arturo SJ argued: “*I understand the future using the ‘Ratio Studiorum’* [a reference to the pedagogical method associated with the Jesuit identity]. *It departs from introspection...you have to discover yourself, your abilities...you are not a sponge that knows everything.*” Respondents emphasised the need to “*understand the person as a set of potentialities*” (Mauricio SJ) aligned with “*God’s plans to orient future action*” (Arturo SJ).

The interviews with religious national directors and nuns revealed similar narrative constructions for their expectations of the future when planning anti-poverty responses. Overall, confronting poverty involves quest narratives that privilege the ‘*path to be walked*’, in which you keep returning to the initial step framed as ‘*what is God’s will?*’ Figure 4.4 below illustrates how narratives shape the expectations of these members.

**Figure 4.4 Narrative construction of the “pilgrimage” expectation**



3.1 Narrative form: Quest. A quest denotes the desire to do something while narrating what is being seen and discovered. Usually, members start their answers by explaining their quest. As an illustration, Sister Marina commented: “*I am in Fe y Alegria because I want a better future for these people. I can help them through education by showing them how to become critical and change their environment.*” Similarly, Ricardo SJ stated:

*“My idea is to empower children. If I can contribute to improving their lives that is my reward.”*

After describing the quest, they explain their desire to act via practical judgements. In the case of Juan SJ, a comparison with the founder of the Jesuits was made: *“I believe that the first day that Ignatius abandoned his house, his everyday life provided him with experiences until the end; by living, he got the meaning of life. I try to do the same.”* As Alvaro SJ remarked: *“The key in life is to constantly learn...you get to the end of the day, reflect until you think you found an answer...you will find a way to be better tomorrow that is aligned with what God expects from you.”*

The constant need for contextualising experience helps members realise the changes needed during the journey. For instance, Arturo SJ stated: *“I started being naïve about my role in social change. Now, after eight years, I am always considering my actions carefully. Things that you consider not that meaningful can have unexpected impacts.”* In a similar vein, Mauricio SJ argued: *“We started in the asphalt [metaphorical allusion to impoverished areas] and now we approach more complex problems. You end up unpacking a Pandora’s Box.”* Finally, members acknowledged that the quest is never ending. In the words of Juan SJ: *“I have been a Jesuit since I was 17 years. I have seen some many changes but usually for the worse. Injustice, exclusion and poverty only evolve.”* Likewise, Sister Lina commented: *“I do not think I can make a big change, but if I only interpret God’s will and a small change is made, I will have fulfilled my purpose.”*

3.2 Narrative Orientation: Cyclical. The answers provided by these members reflect two main themes. On the one hand, there is the cyclical need for understanding the present. For example, Arturo SJ asserted: *“To see forward, you need to practice the [spiritual] exercises, get to know yourself. That only happens with repetition.”* Repetition was also mentioned by Mauricio SJ as the key for the future: *“You structure knowledge based on what you know, and repetition is the key to identifying which things function and which do not.”* As a result of the repetition of practices, members are constantly questioning meanings. For instance, Ricardo SJ argued: *“We know what poverty is today. We will have to see how it manifests itself tomorrow.”* Likewise, Sister Angelica commented: *“In the constant fight against injustice, you have to question truth every day.”* On the other hand, members referred to the need to question social problems. For example, Sister Lina

noted: *“Fe y Alegria began looking at the excluded in rural areas. Now the excluded are inside the city, so we start a new circle.”* Echoing this sentiment, Alvaro SJ stated: *“I have worked in so many Jesuit projects, but at the end, all refer to a similar topic: the poor will always be poor elsewhere.”*

3.3 Future Openness: Questioning meaning. In addition to the cyclicity, the practice of questioning meaning raises issues about ways to respond to emerging demands. To illustrate, Ricardo SJ argued: *“Asking me how I did today allow me to reflect and respond to change.”* Similarly, in the words of Juan SJ: *“The Spiritual Exercises are conceived to reduce the fear of the unknown...you will always have to deal with things you do not know so it is better if you know your abilities and weaknesses.”* Adding to this thread, Arturo SJ commented: *“The point I want to arrive at is that FyA has an enormous question ahead and it is how we do not lose relevance. There are many countries where we are strong, but the context is changing”.* Finally, the constant question of meaning is seen by some members as the only way to make sense of the future. According to Mauricio SJ, *“reflection leads to knowledge about how I fit in this world and how I can impact the tomorrow.”* Finally, Arturo SJ asserted that *“the difficulty of working in FyA is that you need to stop and reflect. If we do not reflect, we lose the chance to respond.”*

#### 4.5.2 Out of many expected futures – one strategic plan

In this section, we present how IFFyA members’ different expectations interplayed in the context of strategy making to tackle poverty. In our study of nine projects, we found two types of interplays, the first of which we called “expectations contestation”. Here, some members covertly resisted the projects because the expected future did not match their expectations. We chose the quality project as an exemplar. The second type of interplay is a process we called “expectations confluence”: different members’ expectations meet “in time” bound by events, goals or perceived benefits. This process generated the misconception that settling a strategic account for action could merge different members’ expectations about the future.

The strategic plan: The federative plan was constructed to synthesise and organise agreements. The idea behind it was to align the various FyA national subsidiaries’ in support of a common objective: the reduction of poverty through education. In

operational terms, the new strategic plan was supposed to maintain the structure of IFFyA's intervention around the implementation of globally designed projects with a proven record of success. For the new plan, IFFyA members designed nine macro-projects. Following the previous strategic plans, members agreed that each project should emphasise "doing good and doing it well". This was seen as the only way to plan and achieve results for alleviating poverty. Below we explain the two types of expectations interplays.

1. Contesting an expected future: The case of the Quality project: The quality project arose from the need to evaluate IFFyA's impact on the communities. This process started "*by diagnosing our current state and by thinking where we wanted to go*", as project manager Helena explained. This project was a long journey. It began with a request that was sent to each FyA national subsidiary that might be interested in participating. As project manager Dario remarked: "*Some FyAs sent information more quickly than the others. It was a difficult process that started slowly.*"

Despite initial difficulties, project managers moved ahead with the project. As one of them, Esperanza, reported: "*After we received some responses of intention, we started thinking about strategic objectives...operational activities...what to measure and how...Our idea was to have a clear image to present a final draft to the public.*" The project managers did not fail in this endeavour, as the final draft of the project included details about metrics, goals and objectives. In the words of Dario, another project manager: "*As a team, we were extremely satisfied with our project. We compelled and analysed several diagnoses. We basically identified where we were and projected where to go and how.*"

Seeking support among other IFFyA members, project managers presented the draft to FyAs interested in "*a construction of a common desired future based on a walked path.*" The document also highlighted the project as "*a standard and comprehensive method that would enable FyA to achieve and measure in a five-year period the value of its proposal in impoverished communities.*" After it was produced and disseminated, the proposal received sharp criticism. For instance, Mauricio, a Jesuit national director, remembered: "*The project was interesting but left no room for experimenting or differences...Not all of our schools have the same problems or the same goals.*" Similarly,

Gustavo a national director, said: *“Quality is not a neutral concept that you can define unequivocally; it cannot signify the same everywhere.”* Project manager Esperanza noted that the project only moved ahead with minor changes in many countries, as *“we needed international funding—and Europeans prefer highly structured logics.”*

Although the project finally received the required funding and was implemented in five countries, it was always resisted. This resistance is explained by two problems related to the misalignment of expectations about the future. First, the quality project privileged project managers’ expectations when planning responses. The project proposed measuring complex processes such as social and individual change with clear future outcomes. In the words of middle manager Jesus: *“They could never understand that when dealing with these problems, you cannot be that cuadrulado (squared in Spanish) to think about the future. Sometimes 1+1 is not 2.”* National director Gustavo commented: *“The system is not multidimensional, multi-actor; it is problematic as it manages an uncertain problem with defined metrics.”* However, when reflecting on what other members expected, project manager Dario asserted: *“I know in all the evaluations, they [directors] claim for open processes, but they are not conceptually clear about what that means. It sounds so ethereal that you think ‘what have they been smoking?’”*

Second, the project standardised for all FyA national subsidiaries an expected version of the future. For instance, Manuel SJ remarked: *“We felt the project is a cage...we are departing from different starting lines that do not necessarily lead to the same final lane.”* National director Mario stated: *“This project offers a static future as if things were not dynamic. When dealing with social problems, that is ridiculous.”* Nevertheless, not knowing what to expect about the future was problematic for most project members. As project member Andrea expressed it, *“We have problems but what they [managers] propose does not have head or feet. I would like to hear how they will control and manage results if they do not know where to go.”*

Since the project favoured a specific way of addressing poverty, members in the FyA national subsidiaries resisted covertly. This process of resistance can be divided into two major activities. First, although various types of data were presented, they were not what project managers had expected. For example, several members commented informally: *“I create and measure what is relevant and present what they [project members] want to*

see.” Another respondent said: *“That project is horrible; the process is a counter-process...we lose time on things that are not of any use to us.”* A second form of resistance can be seen in the informal attempts by members to delegitimise the project. As an illustration, some members stated informally that *“achieving results does not guarantee embracing our mission”* and that *“we have confused our mission with results.”*

Unfortunately, this covert resistance fragmented the Federation. Arturo SJ stated: *“In our last executive evaluation, we noticed that this project [quality] split the Federation; it created isles between us.”* Middle manager Valeria expressed a similar view: *“Many egos were hit. That generated conflict and some members preferred to step down after the problems...”* Rosa a project manager, revealed what happened afterwards: *“A massive division was generated. We felt that the best way to manage it was to tell [Country X] to continue the project with the countries that were interested, even if that meant to drastically modify the project.”*

2. The partial confluence of expectations: The case of the gender project. The gender project developed from the aggregation of several concerns aimed at addressing issues of discrimination and gender inequality. As project manager Claudia remembered: *“In one of our evaluations, we asked about gender issues. That evaluation gave me Goosebumps. It showed the need to deal with topics such as young pregnancy, women abuse and other controversial problems.”* Middle manager Catalina articulated a similar feeling another way: *“We say that we are beyond the asphalt. Now the frontier is not the asphalt; the frontier is gender topics.”* Even religious members shared the concern, as Juan SJ commented: *“When we speak about social justice, the topic of gender equality is a priority.”*

Unlike the quality project, the gender project started on the right foot. Members quickly concurred on the strategic design, which needed to be short-term and based on interconnected pieces. For example, project manager Rocio commented: *“When we started, we were puzzled by what type of intervention we wanted and how that intervention could impact the curriculum of the school...We thought the only way to have results is by working by semesters and different subject areas.”* National directors and middle managers, such as manager Beatriz, shared that opinion: *“Something that worried*

*us is that social transformation is an extremely complex process, so when thinking about gender issues, we thought about short and multiple processes.”*

However, reaching a consensus did not hold together members’ expectations. As Arturo SJ noted: *“We thought we converged but what they are prioritising is the metrics and results, which is not necessarily what we wanted. We expected something more ad-experimentum.”* Correspondingly, middle manager Valeria asserted: *“We thought that having short-term processes could change some dynamics within the federation; we were imagining flexibility to manoeuvre, but now we see that some things will never change in the federation.”* Some members even reported that reaching an agreement still divided members. For example, according to middle manager Cristina, *“Reaching a consensus is not always the rule here, but while we envisioned adaptation and learning, others imagined numbers and more numbers.”*

During the design of the project, a second settlement was achieved: future implementation needed to include exchanges among peers. Different IFFyA members began to realise that ‘one-size-fits-all’ solutions were not the best option to reduce poverty. In the words of Dagoberto SJ: *“We are looking for what things we can put together...construct by proximity such as topics of gender.”* Interestingly, project members shared the idea, as project technician Sandra remarked: *“These processes should be of collective constructions to see what works, what the learnings are and what things do not work.”*

Again, although members managed to concur on exchanging experiences among peers, their expectations about the future—vis-à-vis the process—varied considerably. In the case of national directors and middle managers, the major expectation was that these interactions could encourage communication and empathy. Middle manager Eduardo, for example, commented: *“We can energise the project if we interact with schools from other countries to share initiatives.”* Similarly, Mauricio SJ asserted: *“If we work together, we can grasp the problem that people experience and find creative ways to deal with it in a robust manner.”* However, project members expected something very different from these exchanges. As project manager Pilar recalled: *“We imagine...improving accountability and monitoring of projects and members’ duties.”* In a related line, project technician Helena noted: *“We envision coordination and contact with the people in the regions.”*

Finally, the project was implemented fairly successfully in four pilot countries, as reported by project manager Ernesto: *“The project is going better than we foresaw and that is great news.”* This observation was corroborated by one of the directors who mentioned that they were *“working slowly but there are many people participating in them.”* However, the whole process related to the project left some members with a sense of disappointment. As middle manager Marta remarked, *“We constructed the project collectively; we achieved an important level of clarity, but it feels like we were walking different roads”*. Arturo SJ, a national director, shared that view: *“This was a different experience. Most of the time, I agreed with the steps and how the project unfolded. However, I think that the project overall is not what any of us expected.”*

## **4.6 Discussion**

Our study examined how members’ expectations about the future unfolded in a network devoted to the goal of poverty alleviation and how these expectations affect strategy making. We uncovered three types of distinctive expectations when planning anti-poverty strategies, each one formed on the basis of different narrative constructions. These narrative constructions helped explain how actors’ intentions privileged specific temporal orientations. In our cases, differences are grounded on roles, identity characteristics and the interfaces in which members work in the network. These diverse expectations not only had an impact on planning but also influenced strategy making. Thus, this study offers a detailed analysis of why some strategies may be enacted or resisted. We first discuss how agency and temporality influence the formation of expectations in prospective sensemaking for strategic processes. Then, we explain why organisational members struggle with temporal work. More importantly, however, we demonstrate that temporal work in some cases may be a collective illusion.

### *4.6.1 Prospective sensemaking and agency*

Work on strategy making has been influenced by the notion of the future as something conquerable and time as something that can be homogenised to encompass diverse human actors. This impact has underscored the role of temporality (Brown et al., 2015; Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015) in the formation of expectations about the future (Konlechner et al., 2018). Generally, in the extant literature, prospective

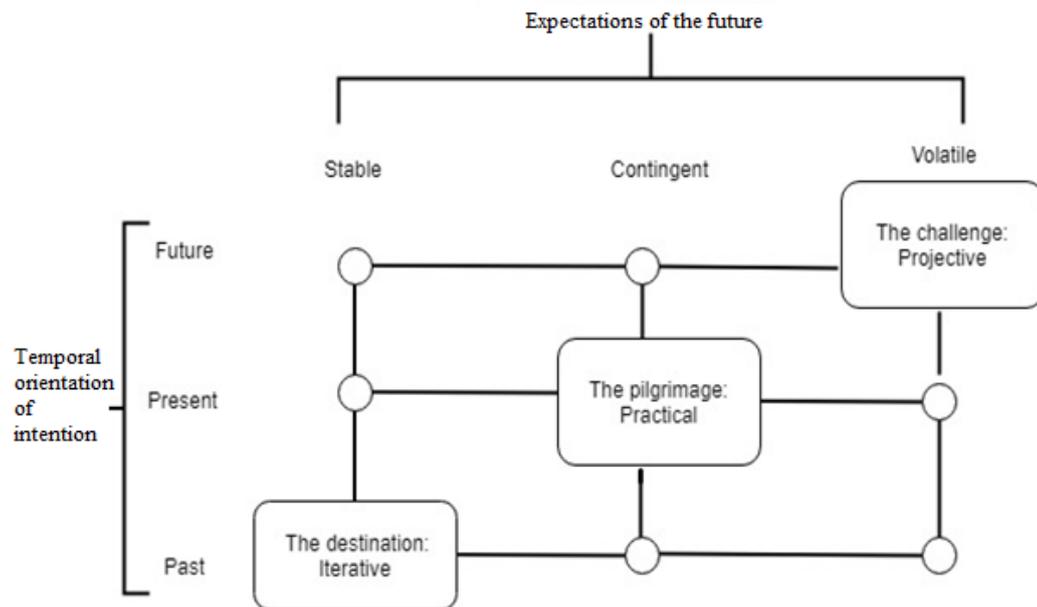
sensemaking is viewed as a retrospective process (Maitlis and Christianson, 2014). However, recent research has pointed out that prospective sensemaking can take the form of counterfactual thinking (MacKay, 2009) and an unfolding conversational interaction (Gephart et al., 2011).

It was not surprising that IFFyA members had dissimilar expectations about how the future would unfold. In our cases, prospective sensemaking, namely the formation of expectations about the future, relied on the intention that privileged explicitly either the past, the present or the future over the rest. This move to a future-past, an ongoing future and a future-future complicates the one-dimensional view of time that has been central to current sensemaking theorizing. Explaining the temporality of intention and its possible links with the future is only possible by looking closely to the different elements of the chordal triad of agency such as iteration, judgement and imagination (cf. Emirbayer and Mische, 1998).

In this analysis, we followed Mead's (1932) conception of positioning human action within temporal passage and Adam and Groves'(2007) suggestion that temporality is the result of different temporal dimensions that interweave creating multiple temporal possibilities. Moreover, we paid particular attention to how actors shape expectations about the future in relation to its social engagement to create meaning in the social world while mediating action.

In figure 4.5 we present the interplay between the temporal orientation of intention and the depiction of members' expectations of the future when planning. Three main modes of prospective sensemaking emerged: (i) the destination privileging iteration, (ii) the pilgrimage privileging practical evaluation and (iii) the challenge privileging projectivity. The characteristics and implications for theory are as follows.

**Figure 4.5** *Expectations about the future and the temporal orientation of intention*



1. *The destination: Privileging the schematisation of the past.* This type of prospective sensemaking privileges the iterational (past) dimension of agency (cf. Emirbayer and Mische, 1998, p. 975). This type of sensemaking refers to a future that feels as already experienced. Here past experiences organise structures for action (Mead, 1932). In our case, project managers and technicians made sense of the future privileging their “abilities to recall, to select, and to appropriately apply the more or less tacit and taken-for-granted schemas of action that they have developed through past interactions” (Emirbayer and Mische, 1998, p. 975). In other words, the expectations about the future of these members relied on the schematisation of past social experiences (Weick et al., 2005). In “the destination”, prospective sensemaking processes are experienced in a retrospective manner, aligning with *future perfect thinking* arguments (Pitsis et al., 2003; Weick, 1979). The destination as sensemaking process has three implications.

First, the expected future is perceived as a place to arrive at which requires continuity and stability. To do so, actors intentionally reactivate past patterns of routines that are incorporated into future images (MacKay, 2009; Weick, 1979)—in our case, the expectations. The core argument of these members is that the future can be achieved more easily when actors feel that they have the most control over it (Comi and Whyte, 2017;

Pitsis et al., 2003). This tendency is observed in how the expectations are constructed, following scripted narratives in which the endings, characters and sequences are known to guide action.

Second, as a result of the locus on the past, expectations about the future remain relatively stable over time. Hence, the thought that guides action can become a cage (Colville et al., 2012). For example, project managers' used projects as rigid templates that influenced the way they made sense of solutions to poverty. Here, new prospective sensemaking processes are triggered only when actors perceive that the present is impeding the expected future.

Third, from a temporal experience perspective, this type of prospective sensemaking relies on a perception of the linearity of time in social interaction (Adam, 1990; Nowotny, 1994). Here the past, the present and the future are the results of the actions taken, as observed in the need to create templates for action where project managers had previous awareness of characters and sequences. Although we acknowledge that project managers did not have hierarchical control in the organisation, most of their projects aligned with previous studies of sensegiving in organisations (Gioia and Chittipeddi, 1991; Rouleau, 2005). Through projects, project managers attempted to influence the sensemaking processes of other FyA members.

Viewed together, these three implications suggest that the destination type of prospective sensemaking can be regarded as fruitful for planning processes when: (i) actors perceive that they have the most control over actions and people in the organisation, (ii) actors perceive that external changes and internal factors have little influence on the process and results, and (iii) there is low need to imagine new outcomes that deviate from current social trajectories.

2. *The pilgrimage: Privileging practical judgement.* This type of prospective sensemaking privileges the practical-evaluative (present) dimension of agency (cf. Emirbayer and Mische, 1998, p.994). This type of sensemaking refers to a future that is already in motion but at the same time is a constant question. Here, the expectations about the future rely on the deliberation with others or with oneself and the exigencies of lived situations. In our case, Jesuit members and nuns formed expectations about the future

based on two processes. On the one hand, they engaged in problematising current experience. For instance, the Jesuits usually questioned the meaning of poverty in today's world. On the other hand, they engaged in a continuous process of contextualising experience, as illustrated by their assertion that meditation on actions and implications is necessary in order to understand God's expectations. As a sensemaking process, the pilgrimage has three implications.

First, the expected future is perceived as a continuous question that unfolds in cycles of problematisation with social and natural objects (Beckert, 2016). In this process, actors recognise a particular situation as unresolved and try to make practical judgements (Emirbayer and Mische, 1998). As an example, Jesuit national directors expected a future with constant deliberation to tackle poverty, a phenomenon that they believe evolves into more complex forms. In a sense, the past was used as a source of nostalgia in a struggle with a future comprised of optimism mixed with pessimism (Dawson and Christopher, 2016). Overall, expectations about the future in this group are founded on narrative quests that privilege the relation between the present and short-term futures over medium- and long-term futures.

Second, given the locus on the present, expectations about the future are contingent. In contrast to project managers, the Jesuit national directors and nuns made sense of the future by responding to contingencies of the present (Mead, 1932). For example, their expectations about the future changed only after they had contextualised and problematised experiences. In this contingency, expectations will always be based on the momentary experience of actors.

Third, from a temporal experience lens, this type of prospective sensemaking depends on a perception of the cyclicity of contextualisation and problematisation in the production of the future (Adam and Groves, 2007). Here present contingencies frame attention on the desired future (Colville et al., 2013). Thus, the future cannot be conceived as finished but perpetually evolving. For instance, after working in the field, some Jesuits and nuns moved from the conception of poverty as purely an economic phenomenon to a more nuanced social challenge.

When we consider all three implications together, the pilgrimage as a type of prospective sensemaking can be regarded as useful for planning processes: (i) when organizational trajectories are extremely contested and making sense of the future depends on political activity (e.g. stakeholder management), (ii) that requires constant adjustment as a result of external changes, and (iii) that addresses topics about organizational ethics and values.

*3. The challenge: Privileging the imaginative engagement with social structures.* This type of prospective sensemaking privileges the projective (future) dimension of agency (cf. Emirbayer and Mische, 1998, p. 983). In other words, this type of sensemaking refers to futures that may or may not come into existence but still guide actors' actions. Here the expectations about the future lie in the realm of the imagination. Through multiple imaginings, actors invent and reconfigure new possibilities for thought and action (Joas, 1996). In our case, national and middle managers made sense of the future by privileging their ability to “move “beyond themselves” into the future and construct changing images” (Emirbayer and Mische, 1998). Expectations about the future based on projectivity have the capacity to hypothesise new futures that depart from what has been experienced or received (Mead, 1932). Consequently, prospective sensemaking processes contribute to the ability to cope with situations in which habits and routines do not provide satisfactory answers. This type of sensemaking has three relevant implications.

First, the expected future is perceived as a dynamic challenge in which actors locate multiple future possibilities. In this process, individuals do not attempt to justify the future as in *future perfect* but create multiple potential outcomes (Tapinos and Pyper, 2018). For instance, national directors and middle managers strove to create small initiatives that responded dynamically to the particularities of different FyAs. Moreover, managers revealed their need to produce responses reflecting novel ways to tackle poverty. Although there is a teleological notion that guides the future, the expectations are flexible and privilege the new. Expectations in “the challenge” category are formed based on disjointed narratives that privilege the co-existence of ‘what if?’ and parallel futures.

Second, with the locus on the future, expectations about the future are volatile. For national and middle managers, these expectations change constantly to recompose the multidimensional nature of social interactions (Boje, 2008, 2011). In contrast to project managers, non-Jesuit directors inserted themselves into a variety of possibilities

happening simultaneously. Some of these possibilities may or may not have an impact on the future, yet they serve as hypotheses of trajectories (Boje, 2011). As an example, managers argued for the need to revise the project logics of the Federation and move to other types of dynamic integration. Thus, for these members, it was more important to understand systemic relationships rather than justifying their goals to cope with uncertainty (Tapinos and Pyper, 2018).

Third, from a temporal experience lens, this prospective sensemaking relies on non-linearity and the existence of parallel times. Here the multiple experiences of actors establishes connections between circumstances and social struggles rather than temporal modes (Boje, 2011). For instance, by working in the field, managers acknowledged the importance of constructing the future with the people based on multiple imaginings.

Taking these three implications in concert, we can regard “the challenge” as a fruitful type of prospective sensemaking for planning processes, as it (i) seeks to address grand challenges or wicked problems, (ii) aims for radical changes in the organisation, and (iii) seeks polyphonic constructions of strategy.

#### *4.6.2 Temporal work and expectations about the future*

Recent research on temporal work (Kaplan and Orlikowski, 2013) has suggested that actors can reinterpret and reconcile temporal understandings collectively into a plausible and coherent narrative for strategic action. However, as our case illustrates, most members struggle with temporal work in strategy making as there are two salient issues related to expectations.

First, we have shown empirically how expectations are formed. These expectations vary in the way members present them in a story way (*narrative forms*), how events are sequentially linked (*narrative orientation*) and how much room for changing the future have (*future openness*). Thus, there is not a single way to structure prospective sensemaking, since narratives draw on different styles and forms. This notion aligns with Dawson and Christopher's (2016) argument that different narratives draw on diverse elements from the past, present and future in a search for sense. For example, screenplays are usually retrospective, coherent and with clear plots and characters. Non-linear

narratives are partial, unfinalized and future-oriented, while quest narratives are about the unfolding now.

Interestingly, each form leads to different questions about what might emerge in the future, what was currently at stake, and even what had happened in the past. This makes temporal work a remarkable task to achieve. We observed that IFFyA members struggled to understand other members' expectations. Temporality was narrated in contrasting ways, delimiting what was possible or impossible in the social world for certain actors. In contrast to previous studies (Gioia and Chittipeddi, 1991; Kaplan and Orlikowski, 2013) in which hierarchy or sensegiving played an important role to purposively steer expectations about the future, its absence led to all voices wanting to be heard simultaneously. In our case, project members emphasised objective and well-defined measures in trying to regulate other members' actions. Unfortunately, the experience of Jesuit members and lay national directors pointed out that this type of planning was unrealistic, thus provoking a major organisational confrontation in several projects.

Second, reducing the future into a lucid and credible narrative may obscure historical, cultural and relational experiences that guide actors' visions of the future (Bakhtin, 1985; Buchanan and Dawson, 2007). In our case, projects served as the plausible narrative for strategic action. However, most of the time, this narrative hindered or failed to address authentically different members' expectations about the future. As such, composite narratives served as a universal view of the world in which actors felt that they were represented but in reality there was a dominant narrative subtly imposed (Buchanan and Dawson, 2007). In this regard, our findings align with Granqvist and Gustafsson's (2016) claim that temporal work is politically naïve as well as with McGivern et al. (2017) argument that such work does not account for actors temporal interests. In order to expand on the problems of representation (contestation) and temporal interests (confluence) in temporal work we followed Bakhtin's (1985) concept of polyphony. Here polyphony is useful to untangle how multiple voices can converge without being subordinated to produce narratives.

*Expectations contestation.* Our case demonstrates that reaching settlements for strategic action through composite narratives obscures or partially imposes a dominant view of temporality. By agreeing on a composite narrative, actors are not leaving behind their

individual intentions and expectations. More importantly, they may differ in their expectations of exactly how the agreed future might unfold. Thus, in cases where the expectations deviate too far from the collective narrative, people start to resist and fight to legitimate their voices (Bakhtin, 1985; Brown and Humphreys, 2003). This finding complements temporal work (Kaplan and Orlikowski, 2013, p. 974) by explaining why “*decisions (...) can lead to breakdowns for others if inconsistencies emerge*”. In addition, it shows that although narratives can be collectively constructed, they do not always translate into composite expectations. In this struggle, there will always be some actors who, through a sense of urgency (Granqvist and Gustafsson, 2016) or power (Brown, 1998), try to impose new settlements for strategic action.

*Expectations confluence.* During the construction of strategic accounts for action, actors may achieve temporal settlements not necessarily due to temporal work. Our findings indicate that temporal settlements can also be achieved when there is a temporal confluence of expectations—that is, when actors clearly recognise that the proposed narrative is appropriate for at least one specific benefit (Suchman, 1995) or as a means to achieve something (Boje, 2011). However, converging at one point might create the illusion that actors are engaging in temporal work. By falling under this illusion, actors may believe that strategic action will lead to the expected future, thus creating a sense of disillusionment when it does not happen.

## **4.7 Implications**

### *4.7.1 Prospective sensemaking and strategy making*

By studying how different members of a network, IFFyA in our case, formed expectations about the future, we have developed a multimodal understanding of prospective sensemaking. In other words, we demonstrate that prospective sensemaking can take a variety of forms. The different forms we discuss in this paper relate to Emirbayer and Mische’s (1998) concept of agency that interconnects notions of intention, temporality and action. This multimodal understanding of prospective sensemaking leads to three overall implications for strategy making.

First, Weick (1995) argues that the problem of sensemaking is not one of uncertainty but one of ambiguity. Therefore, sensemaking is less about problem solving and more about

understanding how actors define problems. In this regard, future perfect thinking (Weick, 1979; Pitsis *et al.*, 2003) explains only one way in which actors deal with ambiguity. As discussed, some actors reduce ambiguity by constantly problematising experience or by engaging in imaginative practices that do not try to justify the future. This practice resonates with the studies of MacKay (2009), Gephart, Topal and Zhang (2011) and Introna (2018) that present other ways of sensemaking. In organisations, understanding how actors make sense of the future is particularly relevant for strategic processes of planning, change and legitimation (Balogun *et al.*, 2015; Gioia and Thomas, 1996). Recently, Balogun *et al.* (2015) have posited that when senior teams occupy dual change roles, this duality is accompanied by dual sensemaking processes, which lead to multiple ways of perceiving what is happening and what will happen. Hence, our analyses provide fine-grained explanations of the potential forms of these sensemaking processes. Moreover, the current study provides a tool for managers to understand how they can draw on different narratives to influence the expectations of other members.

Second, a multimodal understanding of prospective sensemaking may help explain planning process in cross functional ambidexterity (Voss and Voss, 2012; Wang and Rafiq, 2014). By identifying different sensemaking processes, strategists can explore the different relations between product and market development. For example, the market development case addresses the paradox of how to sell existing products (exploitation) in new markets (exploration) (Voss and Voss, 2012). On the one hand, iterative prospective sensemaking can offer valuable knowledge to identify patterns of action that might lead to success in new markets. On the other hand, the case of product development seeks to produce new products (exploration) into existing markets (exploitation) (Zimmermann *et al.*, 2018). Here projective prospective sensemaking can be a source for detaching from what is known and finding innovative ways to conquer existing markets.

Third, a multimodal understanding of prospective sensemaking may contribute to our understanding of the creation of worth in networks (Boltanski and Thévenot, 2006; Girard and Stark, 2003). One of the most important questions in heterarchies is how to produce value. (Stark, 2009). Throughout our study, we demonstrate that different prospective sensemaking processes lead to diverse understandings of how to produce value when planning. For example, for FyA projects managers, tackling poverty relates to plausible

and sequential outcomes. Hence, their conception of value is based on measures and performance. For the directors, tackling poverty is about successfully imagining new worlds. As a result, their conception of value relies on the imaginative reconfiguration of current trajectories.

#### *4.7.2 Prospective sensemaking and organising*

In theoretical terms, we have used our case to show organisations as places where narratives are in struggle with one another (Boje, 1995, 2008; Brown et al., 2015; Currie and Brown, 2003; Vaara et al., 2016). Thus, we argue that opening room to a multimodal view of prospective sensemaking has two implications for organising.

First, as narratives are means of creating meaning and enacting the social world (Weick, 1995), understanding different narratives in prospective sensemaking can enhance authorship and co-ownership. This is particularly useful for organising, when the organisation is highly affected by environmental fluctuation (Gergen and Gergen, 2010). In the case of IFFyA, poverty is a phenomenon influenced by various interwoven social, economic, and political factors as well as members' expected futures. Consequently, being able to organise from different narratives that lead to several expected outcomes may improve the ability of the organisation to respond to external changes while multiplying responses that vary over time spans (Stark, 2009).

Second, a multimodal understanding of prospective sensemaking may facilitate the development of dynamic structures of organising. This is particularly useful when the mission of the organisation is not fixed (Gergen and Gergen, 2010) or when tackling grand challenges (Ferraro et al., 2015) and wicked problems (Reinecke and Ansari, 2016). For example, while IFFyA's mission is to reduce poverty, it is a highly complex issue, since poverty and its implications are not the same throughout the world. During our study, IFFyA directors and religious members asserted the need for imagining radical futures while dealing with present concerns. Ultimately, a multimodal understanding of prospective sensemaking contributes to explain how organizations can create dynamic structures that manage the dilemma between anticipating what might unfold and projecting what they desire to create.

## **4.8 Limitations, boundary conditions and future research**

While we offer a comprehensive explanation of perspective sensemaking from the interconnectedness of expectations and narratives, we have to acknowledge some limitations. First, since the entire study explores the future, there are limitations based on the cognitive and discursive abilities of respondents to imagine and express thoughts about the future. This means that there are certain feelings and bodily experiences that cannot be fully captured by narrative processes. We contend that future research could delve more deeply into the embodied and emotional aspects of sensemaking. Such research may strengthen accounts about how individuals create and interpret meaning to enact ongoing or future possibilities. Another limitation pertains to the extreme setting of our case study. While FyA allowed us to study different processes in which the authority cannot frame a desired outcome, this type of organisational structure does not occur frequently in other types of organisations. We believe, however, that some of the job positions, including the ones related to projects and the directors, share characteristics with positions in other organisations. Therefore, we consider that through “analytical generalisation” (Yin, 1994), we can generalise some insights from a particular set of results to some broader cases. Finally, we argue that future research can explore how diverse actors can engage in coordinated action without closing the future or marginalizing any voices. This aspect is important in strategy processes where actors are geographically distant as in the cases of international NGOs and multinational enterprises (MNEs) to improve their contextual operations.

## **Chapter 5 Moving the frontiers for wicked problems – The role of metaphors in prospective sensemaking**

### **5.1 Abstract**

How do organisational members make sense of an unknown and unknowable future in the context of complex challenges such as wicked problems? Extant literature views prospective sensemaking as a retrospective construction, treating the future as if it had already happened. However, wicked problems challenge this account, as they require actors to deal with complex, and constantly shifting realities. To understand this, we studied how the diverse leadership of the largest international non-governmental organisation in the world providing education for the poor (Fe y Alegria), made sense of their organisation's future during a strategic review process. Our findings reveal the potential of metaphors to enable projective agency. We found that the dialogic construction of metaphors helped organisational members, who faced different and shifting manifestations of poverty in extreme contexts, to imagine an open-ended and polyphonic organisational future. This allowed them to continually re-orient themselves toward multiple possible paths of future action. Similar to how metaphors create semantic innovation, we explain how they can also facilitate imaginative processes and preserve a sense of openness through interpretive viability. By showing how metaphors help actors make sense of the future not in the “future perfect” but in the “future continuous” tense, we also advance understanding of temporality in prospective sensemaking.

**Keywords:** sensemaking, future, polyphony, wicked problems, temporality, metaphor

## 5.2 Introduction

Although sensemaking has been widely studied as a retrospective phenomenon, organisational literature has focused increasingly on its future-oriented dimension (Maitlis and Christianson, 2014; Stigliani and Ravasi, 2012). Much of the existing literature reflects the influence of Weick (1979) in the assumption that making sense of the future is possible only retrospectively through the “future perfect tense” of what *will have happened* (Gioia and Mehra, 1996). On this account, actors imagine the future as if it had already occurred. Prospective sensemaking in the future perfect tense may be useful to guide action in stable contexts where there is agreement on desired outcomes and where planners have the most control over their environment (Gioia and Thomas, 1996; Pitsis et al., 2003). But it may be less productive when goals are unclear or when actors face strategic uncertainty (Kaplan and Orlikowski, 2013; MacKay, 2009; Merkus et al., 2017; Tsoukas and Shepherd, 2004) such as in the context of “wicked problems”. These are intractable problems with so many interdependent factors and diverging interpretations that make them seem impossible to solve (Ferraro et al., 2015; Reinecke and Ansari, 2016).

Scholars have thus called for developing accounts of prospective sensemaking that conceptually go beyond a retrospective dimension (MacKay, 2009; Sandberg and Tsoukas, 2015). Building on Emirbayer and Mische's (1998) notion of agency as a temporal process, they argue that agency is not only iterative, but also projective and cuts across past, present and future (Gephart et al., 2011; Kaplan and Orlikowski, 2013; Wiebe, 2010). This research has been an immensely useful theoretical advancement that paved the way for moving from a narrow retrospective framework, towards a better understanding of forward-looking behaviour. However, our understanding of “projective agency”— or the imaginative shaping of future possibilities (Emirbayer and Mische, 1998) is still limited. Put simply, how actors imagine and project themselves towards the “unknown” with cognitive resources drawn from the realm of the “known”, or the *‘paradox of projective agency’*, is a question that deserves more attention. This is particularly acute for understanding how organisational members can project forward-looking activities and associated strategies to tackle wicked problems (Reinecke and Ansari, 2016) or grand challenges (Ferraro et al., 2015), which has been of increasing concern to management research (George et al., 2016). Wicked problems challenge

prospective sensemaking in two ways. First, organisations are likely to continually confront new manifestations of the problem that are unforeseen and possibly unforeseeable. Hence, solutions are contingent on ever changing realities and ambiguous causal webs that can never be fully anticipated. Second, because “every situation is likely to be one-of-a-kind” (Rittel and Webber, 1973, p. 165) there is no one-best solution that could be applied across different contexts. These complications require actors to retain the ability to be flexible, adapt to dynamic and changing circumstances as well as accommodate multiple contexts and perspectives. This makes it a formidable challenge to make sense of a future in which problems and solutions will be radically different to the current flow of experience, and different in each setting.

To attempt to unravel this challenge we conducted a real time study of a strategic review process from 2014 to 2018 of an international non-governmental organisation, the International Federation of Fe y Alegria (IFFyA). Members aimed at developing a forward-looking strategy to enable their organisation to confront poverty, exclusion and marginalization through education in extreme and marginalized contexts across 21 countries in Latin America, Europe and Africa, and during a period of rapid socio-economic change. Using a qualitative process methodology (Langley et al., 2013), we observed strategy making in General Assemblies and meetings of the Councils of Directors in four countries (Brazil, Colombia, Paraguay and Peru), gathered organisational documents and conducted semi-structured interviews with 130 IFFyA members from Bolivia, Colombia, Ecuador, Paraguay and Spain.

Our findings reveal the limitations of prospective sensemaking in the future perfect tense; wicked problems are hard to tame through projections of events as if they have already occurred. Manifestations of the wicked problem confronted actors with constantly new challenges whose complex causes differed from context to context, ranging from gang violence to rape, which made it seem impossible to project solutions drawing on experience from the past. Instead, we found that members developed alternative ways to engage with the future, namely in the “future continuous” tense (“what will be happening”) to allow for ongoing recalibration and adaptation while keeping a sense of direction.

Prospective sensemaking in the “future continuous” tense was enabled by the dialogic construction of metaphors. Through dialogic constructions or the shape of multiple and heterogeneous beliefs, values and rationalities in participation with others (Bakhtin, 1985; Shotter, 2008), actors envisioned new states by using existing knowledge, mental models and experiences (see Biscaro and Comacchio, 2017). A metaphor is a trope that can create semantic innovation, that is, create new meanings by establishing a novel relationship between concepts (Biscaro and Comacchio, 2017; Cornelissen, 2005; Cornelissen et al., 2008; Gioia et al., 1994). Metaphors emerged, unexpectedly, during our observations as key sensemaking devices that enabled members to imagine evolving futures by fusing realms of experience and imagination, while remaining plastic enough so as to accommodate divergent experiences and enable multiple futures to co-exist.

Our research offers three contributions to scholarship on prospective sensemaking. First, our study contributes to understanding better the role of temporality in prospective sensemaking. We do so by expanding the temporal sensemaking spectrum from the “future perfect” tense to conceptualizing sensemaking in the “future continuous” tense. This provides a processual perspective (Sandberg and Tsoukas, 2015), explaining how actors make sense of the future as a perpetually evolving construction of what “will be happening”, rather than an episodic moment of recovering a sense of “what will have happened.”

Second, while scholars have recognised the generative role of metaphors in aiding creative processes by fusing realms of experience and imagination (Biscaro and Comacchio, 2017; Cornelissen, 2005; Cornelissen et al., 2008), our findings bring these insights to prospective sensemaking. We offer a process model to explain how the dialogic construction of metaphors is an important mechanism for stimulating the “projective dimension of agency” (Emirbayer and Mische, 1998), namely actors’ capacity to conceive new realities and potentialities beyond what is already known. We show that metaphors do so by allowing for imagination of the “unknown” through creative projection from the “known”. This provides one explanation of how actors may overcome the *‘paradox of projective agency’*, which adds critical insight for developing a “truly prospective form of sensemaking” (Maitlis and Christianson, 2014, p. 97).

Finally, while prospective sensemaking scholarship has focused on the creation of settlements on one strategic account of the future when there is coherence among actors (Johansen and Cock, 2017; Kaplan and Orlikowski, 2013; McGivern et al., 2017), wicked problems in pluralistic settings call for multiple possible futures to co-exist. Our model conceptualizes the role of polyphony (Buchanan and Dawson, 2007; Vaara et al., 2016) in prospective sensemaking. By allowing polyphony – the multiplicity of independent and unmerged voices and consciousnesses (Bakhtin, 1984), we demonstrate how metaphors can enable the creation of multiple and renegotiable accounts of the future.

This paper is structured as follows. We begin by reviewing the literature on prospective sensemaking. Next, we detail our empirical context, explaining how our case advances understanding of the theoretical problem. Then we present our findings documenting the dialogic construction of two interrelated metaphors: the *'frontiers of exclusion'* metaphor and the *'tree'* metaphor. Finally, we develop a process model that explains how the process of dialogic construction of metaphors can help actors make sense of an unknowable and evolving future via prospective sensemaking in the “future continuous” tense and discuss theoretical implications of our study.

## **5.3 Theoretical background**

### *5.3.1 Prospective sensemaking*

The future has been a major topic of intellectual inquiry (Adam and Groves, 2007). Notwithstanding philosophical and religious debates about whether the future is open-ended, predetermined or does even exist at all, from an epistemological standpoint, and from the perspective of actors, the future is inherently unknown and unknowable, yet inevitable. Thus, the question of how actors anticipate and project towards the future (Tavory and Eliasoph, 2013) and how future-orientation relates to agency (Emirbayer and Mische, 1998) has been central to debates in management and strategy (Cornelissen and Schildt, 2015; MacKay, 2009; Tsoukas and Shepherd, 2004). Despite fundamental uncertainty about the future, actors seek to make sense of the future by creating “possibilities for thought and action” (Joas, 1996). Attention to this idea has grown specifically in studies of future-oriented, or prospective sensemaking (Gephart et al., 2011; Gioia et al., 1994; Maitlis and Christianson, 2014; Stigliani and Ravasi, 2012).

While most scholars agree that for Weick, sensemaking is seen as inherently retrospective (Gioia and Mehra, 1996; Weick, 1969, p. 64, 1995), future-oriented perspectives on sensemaking have emerged. For analytical purposes, we divide them into a "Weickian" perspective, which adopts Weick's assumption of the future as a retrospective construction, and a "post-Weickian" perspective, which has started to question the retrospective framework.

***The Weickian perspective on future-oriented sensemaking.*** Weick (1995, p. 17) defines sensemaking as "a process that is (1) grounded in identity construction, (2) retrospective, (3) enactive of sensible environments, (4) social, (5) ongoing, (6) focused on and by extracted cues, and (7) driven by plausibility rather than accuracy". This definition has two implications. First, sensemaking is grounded in socio-cognitive processes. Individuals facing reality disruption restore sense of what *has* happened by selecting and interpreting cues retrospectively. Second, sensemaking occurs through "considering the present in terms of the past" (Gioia and Mehra, 1996, p. 1229; Maitlis and Christianson, 2014). This same line of reasoning is also used to make sense of the future. This means that future-oriented sensemaking is conducted in the "future perfect tense" as actors conceptualize the future in terms of "what will have happened", or as if the action had already been completed (Weick, 1969). Weick (1995, p. 29) suggests that placing events "in the past, even if the events have not yet occurred" facilitates sensemaking and the visualization of future states.

Sensemaking scholars have started to push the Weickian perspective and argued that future perfect thinking can be a powerful tool to make sense not *of*, but *for* the future (Gioia and Mehra, 1996). Gioia and Thomas (1996) argued that a desired future image is fundamental to prospective sensemaking. Gioia et al. (1994) found that managers consciously considered future consequences of their proposed actions to better understand the present decision-making context. In Pitsis et al. (2003) study of the construction of a piece of Sydney 2000 Olympic infrastructure, managers consciously pursued what the authors call a "future perfect strategy". Future perfect thinking helped project team members to deal with what was perceived as uncertain in advance of it occurring.

While future perfect thinking may be useful to guide action in routine planning activities or stable contexts where there is agreement on desired outcomes and where planners have

control over their environment (Gioia and Thomas, 1996; Pitsis et al., 2003), it may be less productive when there is tension between actors due to diverging goals and interpretations of cues (Merkus et al., 2017) and when actors face strategic uncertainty (Kaplan and Orlikowski, 2013; MacKay, 2009; Tsoukas and Shepherd, 2004), all of which is likely to complicate prospective sensemaking in the case of wicked problems (Ferraro et al., 2015; Reinecke and Ansari, 2016).

Increasingly, scholars recognize that “the world often changes in ways that are unforeseeable and not easily anticipated” (MacKay, 2009; MacKay and Chia, 2013; Taleb, 2010). Instead of conceptualizing the future as an extension of the past, the future may be viewed as a set of unrealised potentialities, alternative states and possible outcomes that *could* occur (Lord et al., 2015). This implies that new states, capacities or experiences are not necessarily analogous to past knowledge (Lord et al., 2015). Even if complete past knowledge is available, it would be insufficient to forecast all of tomorrow’s possibilities (Taleb, 2010).

These considerations problematize the notion of future perfect thinking because it reduces future-oriented action to what (Emirbayer and Mische, 1998, p. 971) term “iterative action”, where actors selectively reactivate past patterns of thought and action. Thus, “*the actor projects his action as if it were already over and done with and lying in the past [...] the planned acts bear the temporal character of the pastness*” (Schutz, 1967, p. 61). This assumes that future states will resemble previous ones and repeat past routines and present habits (Elkjaer and Simpson, 2011). Therefore, if the future is conceptualized as another version of the past, it becomes impossible to imagine the many unrealised potentialities, openness or uncertainty (Lord et al., 2015). Thus, engaging the future “*as if it were simultaneously past and future*” (Schutz, 1967, p. 61) gives rise to the paradox of projective agency: how can actors make sense of something unforeseen and unforeseeable by treating it as if it had already occurred? and How can they envisage new states that depart from what is already known or experienced? In other words, it is hard to conceive of how actors make sense of the future solely through a narrow focus on present or past events (Costanzo and MacKay, 2009; MacKay and Chia, 2013; Plowman et al., 2007). To address these shortcomings, scholars have called for developing a more fine-grained forward-looking understanding of prospective sensemaking, which we explore below.

*The post-Weickian perspective on future-oriented sensemaking.* Sensemaking scholars have started to question the retrospective framework and called for a better understanding of temporality in prospective sensemaking (Sandberg and Tsoukas, 2015), to further advance strategic discussions about the future (Kaplan and Orlikowski, 2013; Stigliani and Ravasi, 2012; Tsoukas and Shepherd, 2004). Such a “post-Weickian” approach focuses on processes of meaning construction for the future (Konlechner et al., 2018; Lê, 2013) and the temporal aspect of agency (Gephart et al., 2011; Kaplan and Orlikowski, 2013; Wiebe, 2010). Two central considerations characterise this perspective.

First, scholars have explored forward-looking behaviour by considering human agency as a temporal process that is inherently also oriented toward the future (Gephart et al., 2011; Kaplan and Orlikowski, 2013; Wiebe, 2010). As Emirbayer and Mische (1998) argue, agency is not limited to re-experiencing the past; instead, human actors are “inventors of new possibilities for thought and action” as they confront challenges and conflicts. The introduction of temporality has opened sensemaking research to new ways of understanding future orientation. For instance, Kaplan and Orlikowski’s (2013) ‘temporal work’ explores how actors deal with an uncertain future through the construction and reconstruction of strategic accounts that create a plausible narrative linking the past, present and desired future.

Second, future-oriented sensemaking is typically seen as a collective process of intersubjective meaning construction (Gephart et al., 2011; Lê, 2013). For example, in Stigliani and Ravasi (2012) study of product designers, prospection is enabled by the move from individual to collective sensemaking processes. Prospective sensemaking consists of cycles between *retrospective individual* cognitive work and *future-oriented collective* processes.

Both threads of research have focused on how consensual accounts of the future emerge. Gephart and colleagues (2011) showed how this is achieved through the interplay of plans, expertise, hypothetical entities and sequences that construct stories. Kaplan and Orlikowski (2013) explain how strategy makers with competing interpretations of present concerns, historical trajectories and future imaginings come to settle on a particular strategic account by creating plausible links between them. Stigliani and Ravasi (2012)

focus on material artefacts, which make individual cognitive work physically available for group-level sensemaking, which then enables the creation of new mental structures.

By breaking away from a narrow retrospective view, this scholarship has been immensely useful in advancing a more genuine future-oriented perspective on sensemaking. Notwithstanding these significant advancements, more work needs to be done to refine our understanding of the role of temporality in prospective sensemaking (Sandberg and Tsoukas, 2015), particularly in the context of wicked problems.

### 5.3.2 *Prospective sensemaking in the context of wicked problems*

Wicked problems complicate processes of prospective sensemaking. Wicked problems are “large scale social challenges caught in causal webs of interlinking variables” that make them complex, unpredictable, open ended, or intractable (Reinecke and Ansari, 2016, p. 299; Rittel and Webber, 1973). Their complexity challenges actors to overcome the ‘paradox of projective agency’ in two ways.

First, we still have a rather limited understanding of how actors imagine and project themselves towards the “unknown” with resources from the realm of the “known”. This challenge is aggravated in the context of wicked problems. Because wicked problems are intractable, “one cannot first understand, then solve” (Rittel and Webber, 1973, p. 162); or to paraphrase Weick, first interpret reality, then enact it. Even though a current problem may look familiar to a previous one, “*there always might be an additional distinguishing property that might be of overriding importance*” (Rittel and Webber, 1973, p. 164). Thus, using retrospection to anticipate solutions from previous problems onto seemingly similar ones is unlikely to help solve wicked problems, because complex causal relations between existing and new factors cannot be foreseen (Reinecke and Ansari, 2016).

The reorientation needed to tackle wicked problems leads to our second concern, namely the implicit assumption that collective actors need to agree on one uniform vision of the future, such as through temporal settlements (Kaplan and Orlikowski, 2013). A uniform narrative can induce desired change when problems are tame or when organisational hierarchy is available to implement a strategy towards an agreed future. With wicked problems however, it is not even clear what the problem is. Every manifestation of the problem is unique. Principles of solution cannot be developed “to fit *all* members of a

class” of problems (Rittel and Webber, 1973, p. 164). Divergent perspectives increase complexity for future-oriented organizing (Ferraro et al., 2015). Moreover, change efforts may also require different paces to accommodate multiple temporalities in different contexts (Reinecke and Ansari, 2015). Imposing one desired vision of the future may hide alternative voices or perspectives (Granqvist and Gustafsson, 2016; McGivern et al., 2017), which may aggravate rather than improve the wicked problem. This suggests the need for understanding better the polyphonic or plurivocal aspects (Bakhtin, 1984; Vaara et al., 2016) of prospective sensemaking, so as to bring out multiple voices in the collective imagination of possible futures. In this paper, we contribute to these debates by pursuing the following question: *How do organisational members make sense of an unknown and unknowable future in the context of wicked problems?*

## **5.4 Methods**

This study emerged out of an interest in how organisational members might deal with diverse and even ‘colliding’ understandings of the future in the context of wicked problems. This interest underpinned the choice of a qualitative process approach (Langley et al., 2013), in which multiple data collection methods were used. Real-time data collection allowed us to uncover the role of metaphors in prospective sensemaking. A metaphor is a trope that can create new meanings by establishing a novel relationship between concepts (Biscaro and Comacchio, 2017; Cornelissen, 2005; Gioia et al., 1994; Tsoukas, 1991). The generative role of metaphors in stimulating projective imagination about an uncertain future in highly heterogeneous contexts emerged from our data collection and analysis, as explained in the following sections.

### *5.4.1 Research site*

We conducted an in-depth case study of the strategic review process at the International Federation of “Fe y Alegria” (IFFyA). IFFyA is a non-governmental satellite organisation of the Society of Jesus, a Catholic Religious Order commonly known as the Jesuits. IFFyA was founded in 1987 to unite a social movement engaged in “popular education.” It aims at social change through education in contexts of poverty and marginalization across 21 countries in Latin America and Africa. It employs circa 43,000 employees and runs over 2,500 schools attended daily by over 1.5 million children, adolescents, and

adults (Fe y Alegria, 2016 - *Memorias*). We chose IFFyA because of its “revelatory” potential (Eisenhardt and Graebner, 2007, p. 27), as it challenged our extant understanding of prospective sensemaking for the following three reasons.

First, IFFyA’s vision is contingent on the possibility of reclaiming the future as an open-ended potentiality in which alternatives to the status quo can be realised. IFFyA’s mission is to contribute to social transformation through education that empowers actors politically and socially (Perez Esclarin, 2010). Hence, IFFyA members do not just seek to predict the future, but instead create futures that are decisively different from the current flow of experience. This requires imagination and creativity to break away from the constraints of the past and routine planning activities.

Second, by seeking to alleviate poverty and exclusion, IFFyA confronted a wicked problem. It is hard to “tame” problems that are wicked through rational design or planning because they are intractable and cannot be definitely described. Actors cannot produce a definitive ‘road map’, as they are likely to continually confront new versions of the problem that are unforeseen and possibly unforeseeable. Hence, solutions are unknown and contingent on ever changing realities (Reinecke and Ansari, 2016).

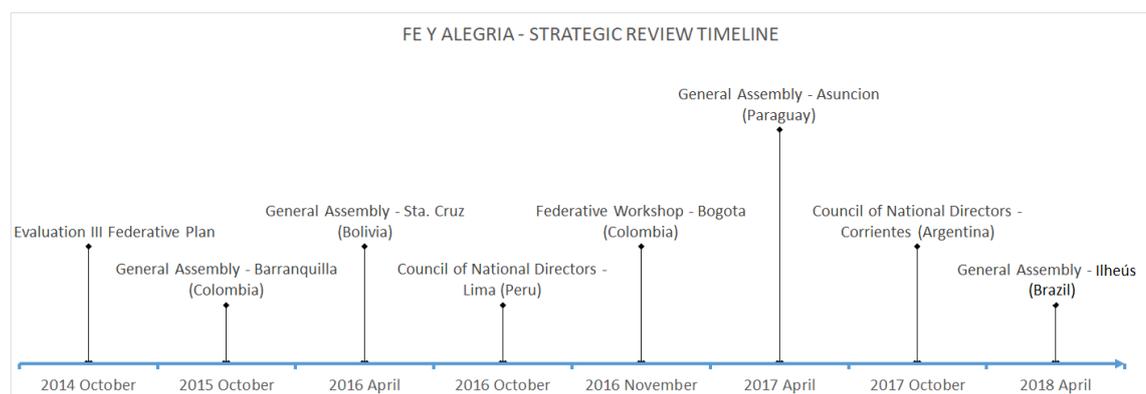
Third, IFFyA operates across radically different legal, historical, cultural and economic contexts, with distinct national education policies and experiences of marginalization. Headquartered in Bogota (Colombia), IFFyA is an umbrella organisation for 21 members (16 Latin-American, 2 European and 3 African). This plurality meant that no single solution would fit all contexts, which made the creation of a global strategic plan a formidable task.

In hindsight, discovering the role of metaphors in prospective sensemaking was also highly fortuitous. During our observations, IFFyA’s strategic review process started to revolve around the collective construction of metaphors to guide action. While initially just a “hunch,” metaphors gained an increasingly important role in the ongoing review to the extent that the new strategy was centred on the ‘*frontiers of exclusion*’ and ‘*tree*’ metaphors (see figure 5.5).

#### 5.4.2 IFFyA's strategic review process

We studied the creation and evolution of IFFyA's strategic plan for 2016-2020, as depicted in figure 5.1, lasting from 2014 to 2018. It was elaborated through a highly participatory process, engaging the board of executives, national directors and project managers representing the 21 national subsidiaries. The strategic review process started with the evaluation of the previous strategic plan in October 2014. Then, it moved to a series of discussions at General Assemblies and meetings of the Council of National Directors taking place in Barranquilla, Colombia (October 2015), Santa Cruz, Bolivia (April 2016), and Lima, Peru (October 2016), Bogota, Colombia (November 2016). The strategic plan was approved at the General Assembly in Asuncion, Paraguay (April 2017), followed up in the Council of National Directors in Corrientes, Argentina (October 2017) and reviewed at the General Assembly in Ilhéus, Brazil (April 2018).

**Figure 5.1 Fe y Alegria strategic review timeline**



At the time of the strategic review, two interrelated changes had started to challenge IFFyA's mission and understanding of the organisation's future. First, in the face of changing manifestations of poverty and marginalization, IFFyA's members were struggling with a lack of clarity about their mission and started to perceive their future as precarious. The wicked problem they sought to confront could no longer be defined by the lack of education in rural areas only, but also involved new and diverse causes such as gang and gender-based violence that prevented children from getting a potentially life-changing education in increasingly urbanizing areas.

Second, due to need for donor-funding, activities were increasingly centralized by IFFyA. Since the first strategic plan in 2000 the federation aimed to design federative programs that could be implemented by all members using funds from public donors, such as the European Union or World Bank, and private donors, such as corporate foundations. Yet, implementation sometimes failed as local actors saw these centralized programs as out of touch with their specific cultural, socio-economic and political challenges. As a result, the strategic review was characterised by both confusion about the unifying mission as well as growing tension between the federation and the national members.

### 5.4.3 Data collection

To understand how members of IFFyA made sense of the organisation's future, we adopted a qualitative process approach (Langley et al., 2013). The data spans the 42 months of IFFyA's strategic review process (October 2014 to April 2018). Using ethnographic techniques, we observed and recorded a total of 65 strategy meetings, conducted 130 interviews in 6 countries, and collected strategy documents. Table 5.1 illustrates the six stages of development of IFFyA's strategic review. Real time research allowed us to study the evolution of IFFyA's strategic review process without being influenced by knowing the outcomes already (Langley et al., 2013; Zilber, 2014).

**Table 5.1 Sources and staged of data collected**

Year	Stage	Event	Sources
1955		Foundation of Fe y Alegria in Venezuela	Documents
1987		Foundation of the International Federation	Documents
2014 (October)	1	Evaluation III (2010-2014) federative strategic plan	Documents Interviews Documents
2015 (October)	2	Barranquilla, Colombia: General Assembly	Interviews Documents
2015 (April)	3	Santa Cruz, Bolivia: General Assembly	Interviews Documents
2016 (October)	4	Lima, Peru: Council of National Directors	Documents Interviews Observations
2016 (November)	5	Bogota, Colombia: Workshop	Documents Interviews Observations
2017 (April)	6	Asuncion, Paraguay: General Assembly and Council of National Directors	Documents Interviews Observations
2017 (October)	7	Corrientes, Argentina: Council of National Directors	Documents Interviews Recordings
2018 (April)	8	Ilhéus, Brazil: General Assembly	Documents Interviews Observations

***Ethnographic observations.*** Ethnographic observations are suitable for researching the temporal aspects of sensemaking because they allow us to engage “with the ongoing temporality of organisational life” (Hernes, 2014, p. 179). By observing in real time how the strategic review process unfolded and how members made sense of the future, we avoided hindsight and retrospective biases from participants (MacKay and Chia, 2013). We also experienced the contexts of extreme marginalization, violence and poverty in which IFFyA operates. To do so, we visited IFFyA’s 22 schools in Bolivia, Brazil, Colombia, Ecuador and Paraguay and Peru, in remote rural areas, slums, high security prisons and areas controlled by drug cartels and guerrillas. These were selected as typical examples that illustrated the plurality of contexts. We attended 65 meetings (192 hours in total, 47 meetings recorded) held in Peru (N=16), Colombia (N=9), Paraguay (N=23) and Brazil (N=17) between 2016 and 2018. Among these meetings, were General Assemblies, Councils of National Directors meetings, federative workshops and meetings at the national headquarters of Colombia and Ecuador and meetings in schools with pupils and parents. Notes of all meetings were taken (Spradley, 1980), and recordings were partially transcribed into Spanish with quotes translated into English. The two researchers fully immersed themselves in the participants’ practices (Van Maanen, 2011) as they shared accommodation, meals and social events with IFFyA members. Meetings took place in religious houses, like a monastery in Peru, and in extremely humble conditions and close to IFFyA schools. In addition to meetings and local schools, we also visited IFFyA’s headquarters in Bogota, Colombia, and its international project office in Madrid, Spain.

***Interviews.*** Between 2016 and 2018, we conducted 130 semi-structured interviews (lasting from 45 minutes to two hours) in 5 countries (Bolivia, Colombia, Ecuador, Paraguay and Spain). This allowed us to fine tune the questions and capture the meaning of the metaphors for IFFyA members. To gain a preliminary understanding of IFFyA, we began with four semi-structured pilot interviews with founding members of the federation and the oldest directors of FyA. We then used purposive sampling to capture a plurality of voices and perspectives across the range of actors who make up IFFyA, including National Directors (N=11 out of 21), middle managers and deputy managers (N= 58 out of 122), employees at the federative level (N=61 out of 80). Interviews focused on a) the strategic review process; b) the autonomous structure of national subsidiaries and their relationship with the international federation; c) stories concerning the future in various

contexts of marginalization and deprivation; and later, d) the significance of metaphors, namely of the *'tree'* and the *'frontiers of exclusion'*.

**Documents.** We gathered both archival and “live” strategy documents produced by IFFyA from 1980 to 2017 to triangulate evidence and to construct a timeline of events and processes, many of which were collected in IFFyA’s archives in Bogota (Colombia). Our relationship with the organisation also allowed us privileged access to confidential drafts of strategic conversations, meetings’ minutes and final strategic and operative communications. Additionally, we also collected over 100 public documents related to IFFyA’s history and operations in different countries. Documents underpin the historicization of events (Hernes, 2014), which allowed us to understand the unfolding of current events within wider temporal trajectories.

## 5.5 Data Analysis

Our analytical approach was open-ended and inductive (Strauss and Corbin, 1998), guided by a broad interest in understanding how members of IFFyA made sense of the organisation’s future during the strategic review process. The analysis followed five phases. The first phase began during the fieldwork (Atkinson and Hammersley, 2007) when researchers analysed memos and notes taken during and after strategic meetings and interviews. Although the study’s original focus was not on metaphors, they spontaneously emerged early on at a General Assembly in Lima, Peru (October 2016). Initially, their role in the strategic review process was merely a tentative hunch. But as the processes we observed became more and more focused on the collective construction of the metaphors, we increasingly shifted our analytical focus to the role of metaphors. Our initial hunch was confirmed when in the summer of 2017, strategic documents portrayed the image of the *'tree'* and the *'frontiers of exclusion'* metaphors as core elements to visualize the federative strategy (figure 5.5).

In the second phase, we imported the data from the observations, interviews and documents into NVivo (V.11) to create an integrated database, generate codes and triangulate sources (Denzin, 1978). We then organized the data chronologically. This enabled us to identify the evaluation of IFFyA’s third strategic plan (April 2014) as the key moment triggering future-oriented sensemaking. Subsequently, we created a timeline

of the processes surrounding the fourth strategic plan (April 2017), and tracked the emergence and evolution of the metaphors.

In the third phase, we started to engage more deeply with scholarship in linguistics (Fauconnier and Turner, 1998; Kovecses, 2010; Lakoff and Johnson, 1980) and organisational theory on metaphors (Biscaro and Comacchio, 2017; Cornelissen, 2005; Oswick and Jones, 2006). In line with growing scholarly consensus in these literatures, we adopted the domains interaction model of metaphors (Biscaro and Comacchio, 2017; Cornelissen, 2005; Fauconnier and Turner, 1998), which emphasizes the generative power of metaphors. It argues that metaphors do not only reflect existing relationships between source and target but create new relationships, that may not have existed before, in a so-called “blended space”. The blending space contains emerging and specific meanings that cannot be reduced to the source and target even if they are conceptually connected to them (Fauconnier and Turner, 1998).

Specifically, we followed Cornelissen's (2005) framework of the domain interaction model that involves three stages to conceptually comprehend the ‘*frontiers of exclusion*’ and the ‘*tree*’ metaphors. First, we analysed observations of strategy dialogues to unveil the development of a generic structure. In this step we identified the source and target domain (e.g. the ‘tree’ and the ‘federation’) and mapped the correspondences among them. In a second step, we further elaborated on the generic structures via the elaboration of the blended space. Finally, when the meaning emerged through the blending, we linked and translated back this composition to the source and target to analyse the new conceptual meanings constructed. The analysis of metaphors under a domain interaction perspective contributed to unveil the role of metaphors in imagination and projection through language (Biscaro and Comacchio, 2017; Cornelissen, 2005) and cognition (Yanow, 2008).

In the fourth phase, and in conjunction with our metaphorical analysis, we moved to analyse the collective processes of sensemaking at IFFyA. Because we researched the collective construction of metaphors through dialogue, we chose a Bakhtian framework (1985) to understand members’ interactions and constructions while creating a new strategy. During this analysis, we focused, first, on the dialogic interactions or, put differently, on how IFFyA members addressed and responded to others’ views through

dialogue (Shotter, 2008). It is important to highlight that in these dialogues there was no dominant voice: all participants of the IFFyA General Assembly and Council of Directors had equal standing, and none of them had, in fact, any form of hierarchical power over the others.

This analysis allowed us to unveil IFFyA's polyphony or the '*multiplicity of independent and unmerged voices and consciousnesses*' (Bakhtin, 1984, p. 208). Second, we examined how IFFyA members shaped multiple and heterogeneous beliefs, values and rationalities in dialogue with others, creating multi-authored meanings about IFFyA's past, present and future. We hence coded our data looking for evidence of metaphors, dialogic interactions and constructions, and developed a preliminary list of 88 descriptive codes. These codes broadly related strategic change, identity, organisational history, time, and emerging concerns. For example, "the asphalt is not any longer rural" and "the root can be perceived as our national nodes". Then, we found relationships between the descriptive codes and grouped them into 18 first order categories revealing clashes with IFFyA's mission and problems with the federative structure.

In the fifth phase, we identified relationships between our first order categories to create second order themes. In this phase we considered data and theory in parallel (Gioia et al., 2012). Special attention was given to the role of metaphors in conjunction with the dialogic processes to understand what was stopping sensemaking for strategy making. In line with Maitlis and Christianson's (2014) triggers of sensemaking, we labelled the failure of the foundational image as sensemaking breakdown. This exposed the need to revisit the mission while creating a new metaphor that incorporated different members' perspectives. We zoomed in the dialogic interactions of IFFyA's members to respond to each other's views while acknowledging the existence of diverse realities (Shotter, 2008). On the one hand, it revealed frustration with the current federative structure that proposed a dominant and unique view of alleviating poverty. On the other hand, it unveiled the role of metaphors in recovering sense of reality.

Metaphors were crucial in imagining a new federative structure. Based on Cornelissen (2005) and Yanow (2008) theoretical insights, we unveiled the power of metaphors to create new meanings using existing ones. As a result, we labelled using the characteristics of the tree to envision desired functions of the new structure as imagining a new federative

organisation. Without this new metaphor, IFFyA members could not create a strategy in which all felt represented. As a fact, multiple voices (from different National directors) collectively constructed a ‘multi-branched story’, which then informs a ‘polyphonic strategy’ (Boje, 2008). In our case, creating a polyphonic strategy required connecting the “tree” metaphor to the national projects while acknowledging members’ differences. (see Table 5.2).

**Table 5.2 Analytical coding**

FIRST ORDER CATEGORIES	SECOND ORDER THEMES	THEORETICAL PROCESSES
Clashes with IFFyA’s mission: Growing in public provision of schooling.	Sensemaking Breakdown: The foundational image fails to guide Prospective Sensemaking.	METAPHORICAL DIAGNOSIS
Clashes with IFFyA’s mission: Reduction of poverty in Latin-America.		
Clashes with IFFyA’s mission: what is Fe y Alegria mission?	Revisiting the mission: Reconstructing the “asphalt” image as the “frontiers of exclusion” metaphor	
Clashes with IFFyA’s mission: The federation was caught in the past.	Frustration with standardized, one-size-fits-all solutions.	
Strategic macro-micro tensions.		
Types of interactions needed between nodes and the federation.		
Misalignments between strategic plans (Nodes and federation).	Revisiting the mission: Emergence of the ‘tree’ metaphor	
Looking for images to explain organisational characteristics.		
A biological tree and its life cycle.		
Using the characteristics of the tree to envision desired functions of the new structure.	Imagining a new federative organisation	
Changing from top-down to bottom-up logics.		
Clashes with IFFyA’s mission: Imagining new markets for operation based on demographic and geographic factors.	Constructing a polyphonic strategy.	
Creating connections between the national nodes and the federation through the tree metaphor		
Clashes with IFFyA’s mission: Linking the new mission to the past.	Embedding a new way of proceeding / Connecting multiple futures to the founding mission.	METAPHORICAL EMBEDDING
Structure: Bridging the tree to the past experiences, present concerns and future initiatives.		
Clashes with IFFyA’s mission: Re-reading constantly social contexts.	Walking the path / The continual reconstruction of the future.	
Clashes with IFFyA’s mission: Continuity-discontinuity management.		
Flexibility and adaption to current trajectories.		

In the last phase, we used theoretical coding to relate second-order themes to broader theoretical dimensions. To develop a processual understanding of future-oriented sensemaking, we focused on the emergence, evolution and use of the identified metaphors

in different organisational layers. The emergence part of this work was labelled as “metaphorical diagnosis”. A cluster of themes emerged around identifying triggering events for sensemaking (Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015) and metaphors’ ability to recover sense (Patriotta and Brown, 2011). We identified this part as an enabler for the future-oriented sensemaking processes identified in the second process. We called the second theoretical process “metaphorical projection”. In this process, the concept of “projectivity” (Emirbayer and Mische, 1998) contributed to the identification of diverse links between the imagination of the future as well as the construction of a polyphonic strategy in which members felt represented. After multiple futures were envisaged, we categorized as “metaphorical embedding” the ways in which participants integrated different ways of future making into current trajectories. Theoretically, this integration means to embed the future into temporal realms (Kaplan and Orlikowski, 2013) and into social trajectories (Tavory and Eliasoph, 2013). As Emirbayer and Mische (1998) argue, future possibilities are conceivable in social arenas as long as they are not completely disruptive to the point that others cannot make sense of them.

At the end of our data analysis, we travelled to Ilhéus, in Brazil, to present a research report of the strategic review to IFFyA’s board of directors. We also had opportunity to discuss our theoretical arguments related to prospective sensemaking with board members. Feedback helped us further refine and substantiate aspects of our analysis in terms of coding and themes.

## **5.6 Findings**

Our findings reveal the role of metaphors in prospective sensemaking in the context of wicked problems. We thus present how IFFyA’s members used metaphors to make sense of the future in order to renew IFFyA’s vision and mission as part of the new strategic plan (2016-2020). Two key metaphors emerged – the ‘*tree*’ and ‘*frontiers of exclusion*’. We present their emergence and evolution over three interrelated and partly overlapping phases. In the first phase, we describe how metaphors helped IFFyA members make sense of organisational challenges confronted in the present. In the second phase, we present the development of these metaphors to imagine multiple organisational futures. In the

third phase, we examine how metaphors contributed to keep future open and malleable while embedding new futures into current trajectories.

### 5.6.1 *Metaphorical diagnosis*

#### 5.6.1.1 Sensemaking breakdown: The foundational image fails to guide prospective sensemaking

The strategic review process surfaced a breakdown of IFFyA's members ability to make sense of their organisation's future. Sensemaking breakdown was triggered by a failure to use the image of operating "*where the asphalt ends*" as a guide for the future. Since its foundation in 1955, in Caracas (Venezuela), IFFyA's mission has been understood in the words of its founder, the Jesuit priest Jose Maria Velaz, as: '*Fe y Alegria should be located where the asphalt ends, where there is no potable water and where the city loses its name.*' (Marquinez, 1987b). For many decades, "*where the asphalt ends*" literally meant the lack of concrete roads in remote rural areas. It defined IFFyA's mission as the provision of education to rural populations who were otherwise excluded from receiving an education. Remoteness and isolation of many of IFFyA's schools became part of the organisation's identity. For instance, Alvaro (Director) commented: '*Some schools would be visited by the director every 7 or 8 years - they are so isolated that it would take 3 days on a boat to reach them*'.

However, with the increasing urbanization of Latin America during the 90s, the "*asphalt*" no longer ended where IFFyA's schools started. As Alvaro (Director) put it, '*the limit imposed by "where the asphalt ends" no longer matches reality*'. This change was also documented in strategic documents during the meetings in Peru (October 2016): "*the increasing urbanization of rural areas meant that many FyA schools were now in urban areas*". Instead of alleviating poverty in the rural, new and more complex problems related to poverty had emerged, including "*gang violence, high inequality, lack of social cohesion and gender discrimination*" (Eduardo, Director, Interview). These dramatic socio-economic changes meant that the image of the '*asphalt*' lost its ability to guide sensemaking. As a result, IFFyA members struggled to imagine their purpose beyond the rural areas. In words of Arturo (Director, Interview): '*the history of IFFyA is no longer enough for us to know what we want*'. Similarly, Sandra (Director, direct observation,

Peru, 2016) asserted: *“There are places where the asphalt arrived long ago”*. All these changes progressively led to a crisis of purpose. IFFyA members faced a growing mismatch between IFFyA’s core purpose and the changing nature of the problem they sought to address.

Notwithstanding these changes, the ‘*asphalt*’ continued to provide a pervasive image guiding sensemaking in different contexts. During one of our field trips, while driving to a local school in El Chaco (Paraguay, May 2017) that was not accessible by paved roads, an IFFyA employee told us: *‘You see how we have been driving for several kilometres off the road... These schools can only be accessed on a 4x4’*. In many of IFFyA’s schools we saw paintings of young kids attending schools depicted as being isolated and in rural areas. Additionally, at the XLVI congress of IFFyA in Lima (Peru, October 2016), Lucila (school teacher) commented *“The asphalt is our option to work with the poor”*.

#### 5.6.1.2 Revisiting the mission: Reconstructing the image of “asphalt” as the “frontiers of exclusion” metaphor

The crisis of purpose became evident during the first meetings of the Council of National directors in Lima (Peru, October 2016). In their discussions, IFFyA national directors and federative members realised that the challenge they faced was to revisit IFFyA’s mission, as the following excerpt reveals:

(Arturo, Director): *‘Reality is changing... we need to create new models to respond to our mission; the problem is that we have not reached a good level of clarity’*

(Yasmin, Federative): *“The popular education requires us to think what we want! For that we need to take into account the realities and experiences but be careful that we need to read them critically.”*

(Ricardo, Federative): *“What we need to think about is our intention ... We know Fe y Alegria is here to transform social conditions... to identify social injustices... and to propose something to promote change.”*

(Alvaro, Director): *“The government has covered rural areas and provides education in marginalized communities. So, we need to think, what have we got left to operate?”*

As the discussion evolved in the meetings of the Council, IFFyA members realised the need to reconceptualise the meaning of “*asphalt*”. In words of Ricardo (Federative): “*Where is our asphalt now?*” The following interaction illustrates the mismatch between the foundational image, which linked poverty to the singular problem of “*remoteness*”, and the diversity of problems now faced in different contexts:

*Javier (Director) “We have to think about the people not covered by the state...such as young and middle-aged people who never finished school and need to learn a job....” [Many voices in the background]*

*Jose (Director) “In [my country] we are a multicultural country, but the government does not have all the tools needed to address those populations.”*

*Manuel (Director): “In [my country], our biggest problem is how we can get young people out of gangs. They do not have choices and violence is all they got.” [More interventions]*

Antonio (Director) added, “*The African matter [lack of integration and participation] requires us to think more about diversity*”.

Through extended discussions during these meetings, it became clear that the meaning of “*asphalt*” had re-emerged in new and even more complex forms. We witnessed these new manifestations in terms of exclusion in a school in Latin America that we visited in 2017; a teacher explained to us that her greatest challenge was neither the lack of accessible roads to the school, nor other material amenities, but making sure girls “*were not raped on their way to school*”. As the literal meaning of ‘*where the asphalt ends*’ was no longer able to guide sensemaking, actors started to reconceptualise it in more metaphorical terms: *For some, [the asphalt] will continue being rural areas; for others, in a more abstract sense, it would mean where the government fails to provide education, where there are excluded actors*” (Juan, National Director).

The image of “*where the asphalt ends*” was reconceptualised in metaphorical terms as the “*frontiers of exclusion*”, as Arturo (Director) commented: ‘*We need to think where are we needed? and which are our new frontiers of exclusion?*’ Marcela (Federative) remarked (Council of Directors Meeting, Lima, October 2016): “*The new frontiers*

*should go beyond the rural. We have now problems in gender and displacement by violence*". Thinking about the metaphorical meaning of the asphalt helped rethinking the mission of IFFyA's members in terms of searching for new "*frontiers of exclusion*" and addressing them while staying true to the original mission as defined by Velaz's back in 1970s. The new metaphor, "*the frontiers of exclusion*", was officially recorded in the summary document of the Lima meetings (2016) as: '*We want to be coherent with our original passion... to project socio-educative projects in the frontiers of exclusion*'".

#### 5.6.1.3 Frustration with standardised, one-size-fits-all-solutions

While the early deliberations created a sense of clarity about how changing realities would require IFFyA to conceptualize the "*frontiers of exclusion*", subsequent meetings of the Council (in Peru) focused on the failure of the previous strategy to address these new and changing "*frontiers*". For instance, the evaluation document noted: "*After the analysis of all programs...the conclusion is that we achieved the objectives, but only partially*" (Federacion Internacional Fe y Alegria, 2014, p. 15). The same document (p.12; p.15) also identified "*a standing tension between the federative and the national level*" which was linked to the fact that plans "*are not always articulated*".

IFFyA's previous strategy revolved around the creation of 'federative programs' to attract public and private funding, whose implementation was overseen by the federative level. However, during the Council meetings in Peru (October 2016) two major growing frustrations were aired. First, that centralized programs led to standardization and to a top-down approach to poverty, marginalization and education. National directors started to express frustration that the '*federative programs*' failed to address the problems unique to their local contexts. For instance, Claudia (Director) commented: "*The major problem we have is that our national priorities do not coincide with the federative ones*". Similarly, as David (Director) asserted, "*We have no flexibility to manoeuvre...It's a vicious loop*". Put simply: one-size-fits-all solutions were deemed to be inappropriate for dealing with the new '*frontiers of exclusion*', which could not be addressed through a single and uniform 'solution'.

Second, IFFyA lacked collaboration and knowledge sharing among national subsidiaries. Gaston (Director) pointed out: "*The federation needs to think how the big and established*

*countries [national subsidiaries] are going to contribute to the small ones*". Similarly, Andres (Federative) commented: "How are we going to share knowledge among ourselves? We do not need to invent the wheel again". Given the limited interaction among national subsidiaries, members could not share resources, concerns or ideas about future projects outside of the federative programs.

Both frustrations pointed out the need to understand the federation differently. For instance, Ricardo (IFFyA member) suggested, "*we need to come back to the micro; our realities are so diverse and changing so fast that we cannot pretend to act in macro-standard programs*". In a related line, Arturo (director) argued, "*We already know that the federative structure does not respond to our needs...we know that we perceive the federation as an external actor. It is necessary that we continue discussing the problems with the current structure*". As the Council meetings continued, directors expressed a sense of frustration about the lack of progress they made about the strategic plan. Gustavo (director), "*I hope that in this new plan, we can align better the strategic plans [national and federative]*".

#### 5.6.1.4 Revisiting the mission: Emergence of the "tree" metaphor

The metaphor that would become central to the strategic review process, and to re-imagining IFFyA's future, first emerged at the third meeting of the Council of Directors (Lima, Peru, October 2016). To advance the stalled discussion about the relationship between subsidiaries and the federation, Arturo (Director) tried to stimulate critical reflection by asking: '*What image could describe the organisational structure?*'. Attendees quickly came up with ideas like '*The Kingdom of God*' or a '*tree*'.

Discussions revealed that the biblical metaphor of the '*Kingdom of God*' was too abstract and difficult to fill with concrete meaning. Directors found it much easier to think about the organisation as a '*tree*.' This image immediately triggered a lively discussion (Direct observation, Lima (Peru), October 2016):

Gustavo (Federative): "*I find the tree to be a good image as it goes through different changes during its life. It's like the federative programs: We have finished the third federative plan and we go now for the fourth.*"

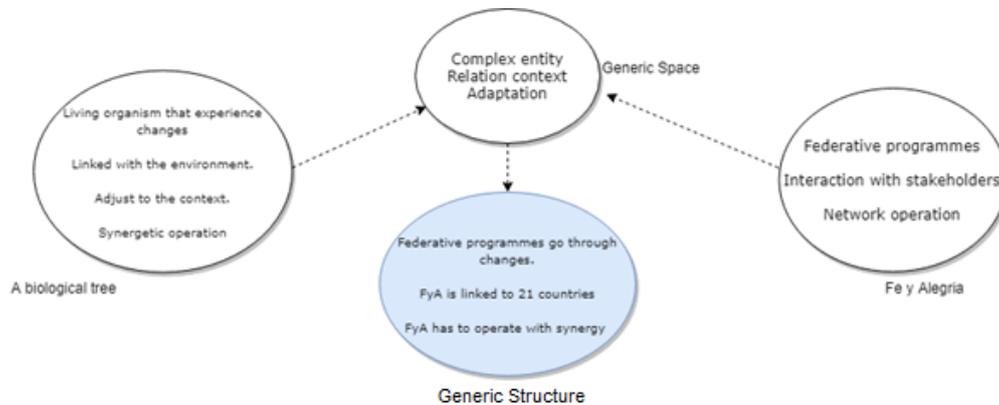
German (Director): “*FyA is a movement and the tree represents movement and synergy in one entity.*”

Mario (Director): “*The tree has to adjust to its environment as our countries have to adjust operations to their social contexts. Neither the tree nor my FyA in my “country” can survive if we don’t adjust to the environmental conditions*”.

Humberto (Director): “*A tree gives fruits and we provide outcomes for the populations in which we operate.*”

The dialogue above shows how members encoded and constructed correspondences between relevant characteristics of the “*tree*” and IFFyA. As each different member provided his own correspondences between the ‘*tree*’ and Fe y Alegria, the ‘*tree*’ became a polyphonic construction carrying many embodied voices, logics, and perspectives. Figure 5.2 illustrates the metaphor that resulted from the above dialogue.

**Figure 5.2 Metaphorical construction**



The ‘*tree*’ metaphor caught on quickly: in lunch breaks and subsequent informal gatherings, IFFyA members kept using the metaphor of the ‘*tree*’ to talk about the relationship between the federation and the countries. The ‘*tree*’ emerged as a way of depicting how the members envisioned a bottom-up approach, as the following dialogue during fourth meeting of the Council shows:

Gregorio (Director): *“The image helps me to understand better [“my country”], especially the relationships between the stem and the roots, I mean the federation and the countries”*.

Federico (Director): *“The topic about countries is a big deal because the fruits rely on them. We have to align them somehow”*.

Gustavo (Federative): *“This image allows us to think about how to decentralize the current federative structure, passing from something lineal to something flexible”*.

In sum, this section traced how a sensemaking breakdown occurred as new forms of poverty and exclusion questioned IFFyA’s understanding of their mission as unified, clearly and narrowly defined. The strategic review challenged members to reconceptualise their mission and recover a sense of organisational unity amidst diversity. During this process, a foundational image was revisited and transformed, leading to the emergence of two new metaphors. The *‘frontiers of exclusion’* metaphor renewed members’ conceptual understanding of the wicked problem (poverty) and helped them to expand the organisation’s mission beyond geographic frontiers. The *‘tree’* metaphor symbolized both flexibility as well as unity, allowing for a more decentralized and bottom-up conceptualization of organisational strategy.

### 5.6.2 *Metaphorical projection*

This section describes how the *‘tree’* metaphor helped to open imagination about multiple and localized futures. This process occurred over two phases. The *‘tree’* metaphor was first used to open imagination over a series of Council meetings in Lima (Peru, October 2016). Then, over a series of workshops in Bogota (Colombia, November 2016), project members and national directors enacted the *‘tree’* metaphor.

#### 5.6.2.1 Imagining a new federative organisation

As meetings of the Council continued in Lima (Peru), directors and federative members continued to discuss the meaning of the *‘tree’*, which they recognized as a promising image to conceptualise the organisation:

Ernesto (Director): *“The tree is the perfect image for thinking our new structure as it involves the idea of having products like fruits and that we are a tree in a forest of organisations”*.

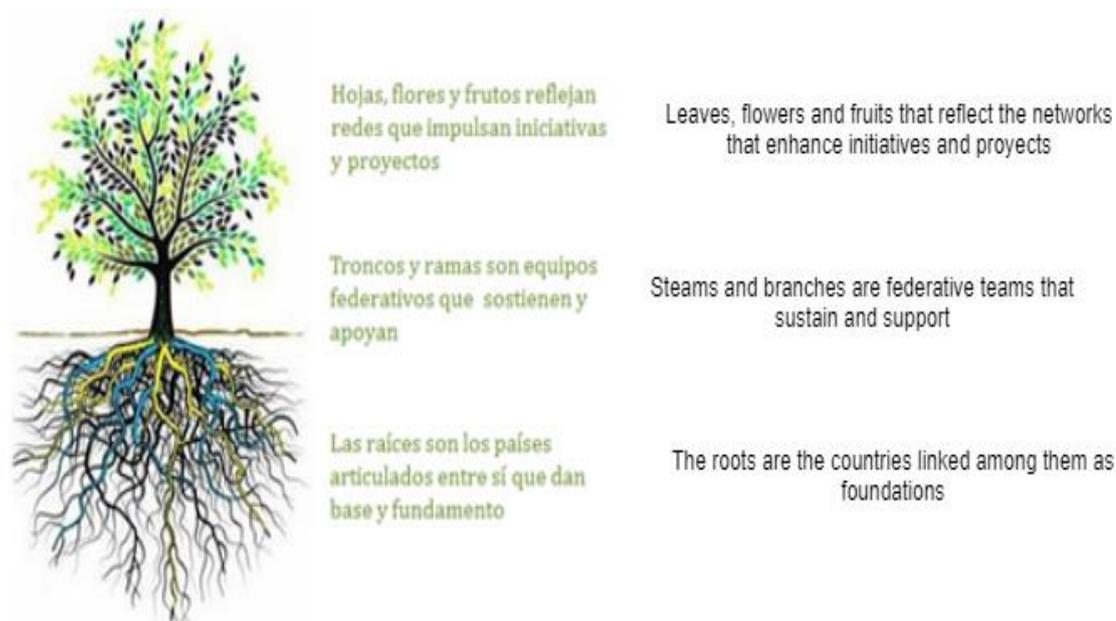
Hernan (Director) explained, *“The image of the tree reflects a desire, a dream”*.

Jose (Director) said, *“This helps me understand what we want, which is more flexibility.”*

(Direct observation, Peru, 10/2016)

The tree allowed IFFyA members to imagine how different countries related to each other and the Federation. For instance, Ricardo (Federative) pointed out: *“If we are thinking the new federative structure as a tree it makes sense then to think how we picture that tree, no? If you asked me, I see it that the roots of this tree are each of our national nodes. The stem and boughs are the federation, and the fruits are the initiatives that we will produce”*. Attendees could now envisage themselves being part of a coherent whole, while adapting flexibly to local needs. Ricardo’s comment was followed and supported by Gaston (Director): *“the image gives us a body experience”*; and Belisario (Federative): *“This is a spectacular starting point to start thinking what we want”*. Figure 5.3 shows the image IFFyA members used to prompt discussions about the new federative structure.

**Figure 5.3 The tree and associated meanings**



IFFyA members started visualizing the ‘tree’ as a network, in which “leaves, flowers and fruits reflected networked initiatives”. In words of Manuel (Director): “It helps me to identify which countries I can work with, considering the needs of my country”. Then, the discussion in Peru moved on to identifying topics of interest, that could underpin the so-called ‘networked initiatives’ linked to the ‘new frontiers of exclusion’. Some Directors aimed for innovative change, stressing the need to “think about something different, other than programs” (Rogelio, Director). Instead of thinking about global projects, IFFyA members prioritized local contexts. At this point, they stopped using “federative programs” and started speaking of “initiatives”. Initiatives would be topics that each country could choose freely and then connect with other countries around similar priorities: “So we are assuming that this tree can help us to imagine and create interactions between countries. Then, we need to decide which initiatives are going to be important for our countries” (Ricardo, Federative).

Freed from the top-down imposition of federative programs, the National Directors came up with a list of initiatives that different nodes hoped to engage in over the coming years. The result was 40 initiatives, including gender, multicultural education, citizenship education, indigenous coverage, migrants and peace education. At this moment, the ‘tree’ became the central image around which the creation of the strategic plan was structured.

#### 5.6.2.2 Constructing a polyphonic strategy

One month later, the strategic review process resumed with a series of strategy workshops in Colombia. During the strategy workshops, the “tree” was used as an explicit visual device to stimulate imagination. The progress made in previous meetings was presented to IFFyA’s project and middle managers. Pointing to a tree that was drawn on a big piece of paper Antonio (Director) stated:

*‘You may know, we decided in Bolivia that we wanted to find a new way of structuring ourselves as a federation. We started this process long ago and in Peru we found an image that helps us to go where we want.... This image is a tree. We conceived the roots as where the federation is born, the stem as the structure that will sustain future endeavours, and the leaves as the initiatives we want to create.’* (Direct observation, Colombia, November 2016)

After Mauricio (Director) remarks, participants were asked to physically work on the tree: ‘The tree is where we put our expectations in terms of structure; the tree is also planning, and we should insert into it the fruits that result from this workshop’. Poster-size drawings of a tree were used to foster dialogue and open up imagination. Post-it notes and pens were handed out to invite participants to write what type of initiatives they would like to create to address local problems and pin their ideas as “leaves” onto “branches”. The tree’s branches soon became covered in colourful post-it notes, as Figure 5.4 shows.

*Figure 5.4 Working on the tree*



By working with the ‘tree’ metaphor, participants realised that many of the ideas for initiatives they had stick on the ‘branches’ as post-it notes resembled one another, helping them realise shared priorities. Participants thus started grouping these similar ideas together. The final ‘tree’ was useful to visualize such commonalities: *‘the idea behind the tree is that we have to find initiatives that are important for us and that we can participate in as a network’* (Ricardo, IFFyA member). The ‘tree’ soon became useful to open up imagination around the two most prominent challenges IFFyA faced. First, it helped to move away from a unified towards a pluralistic conception of what the ‘frontiers of exclusion’ were; second, it freed up imagination to think beyond the centralized solutions to wicked problems that the federative programs had previously imposed.

Once initiatives were imagined, Ricardo (Federative) suggested workshop participants to compare them with the ones that the national Directors identified earlier in Peru, and “*think of different layers of priorities*”. At the same time, worries about rigidity were dissuaded: “*Do not worry, as this time the tree is an open model. What is not core for 2017 will enter later*”. The open-endedness and flexibility that the tree afforded was welcomed: “*I am happy to hear that the tree is open. Now we can build networks around certain initiatives that different countries are passionate about. And we can plan for 6 months or longer*” (Lazaro, Director). Reaching such a plural construction at the workshop in Colombia provided the inputs to be fed into the Operative Plan for 2017. This endowed participants with a sense of achievement and participation. For instance, Marucha (federative member) said: “*This workshop helped me to identify initiatives to guide my action. Additionally, I can feel I am a part of the construction of that story*” (Direct observation, Colombia, November 2016).

In sum, a polyphonic strategy emerged linking conceptually the ‘*tree*’ and the ‘*new frontiers*’ metaphors into a coherent image, while stimulating imagination of the organisation’s future: IFFyA’s nodes all grow out from the same stem, have similar roots, yet can ‘branch’ out into different directions so as to address ‘*new frontiers*’ in different local contexts. Our ethnographic observations allowed us to understand the diversity of solutions that local schools used to tackle violence across different contexts. For instance, in Colombia, the end of the civil war triggered work on what is referred to as ‘*a culture of peace*’. In El Salvador, local schools use theatre to dramatize the encounter between victims and aggressors. In El Chaco (Paraguay), violence is closely associated with drug trafficking, and local school focus on educating pupils about drugs. In another place (made anonymous to avoid stereotyping), schools focus on gender education to tackle gender-based and sexual violence: ‘*I call my mother every morning because I never know if I will come back home or how will I come back*’ (informal conversation with a teacher, 2017).

### 5.6.3 *Metaphorical embedding*

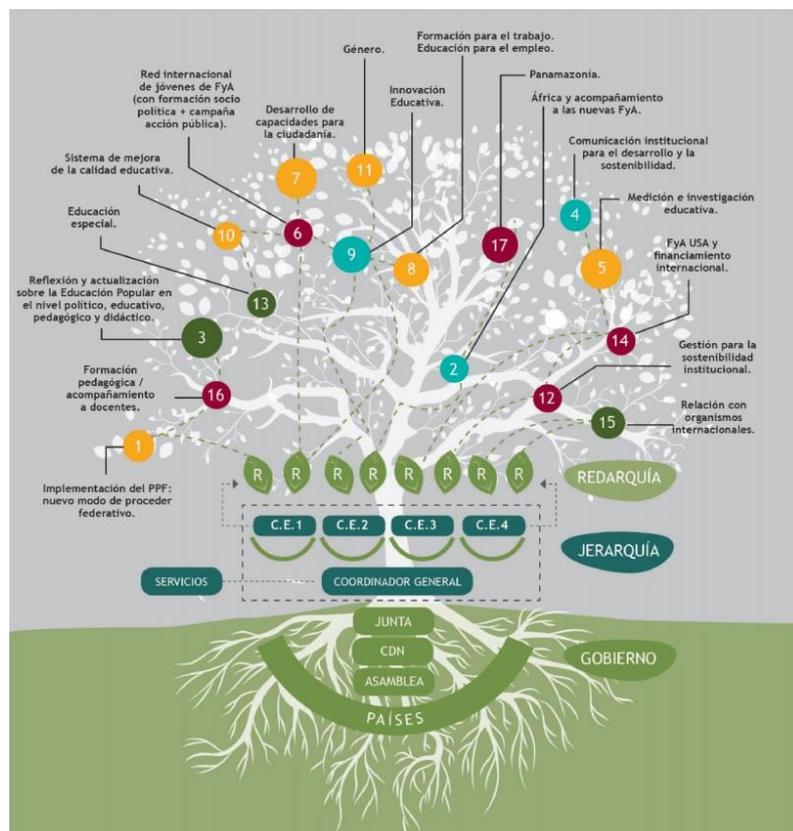
This section describes how IFFyA finalized the construction of the ‘*tree*’ metaphor as a visual and metaphorical representation of a new strategic approach, referred to as a ‘*new way of proceeding*’. First, IFFyA members linked the imagined futures to the federation’s

founding mission to signify continuity. Second, the metaphors were constructed as a guide for the continual reconstruction of the future.

### 5.6.3.1 Embedding a new way of proceeding / connecting multiple futures to the founding mission

The General Assembly series of meetings in Asunción (Paraguay, May 2017) aimed at finalizing the strategic plan. In contrast with previous strategic plans, the new plan was a radical departure. Rather than a 100-page document containing detailed projects, indicators, objectives and budgets to be realised by each node and the federation, it was surprisingly short (20 pages), open-ended and focused on visualising different levels of the strategy: It centred on a new and detailed version of the “tree” (Figure 5.5). For this reason, it was officially presented to attendees by Gustavo (Director) as “a new way of proceeding” signifying a departure from previous, top-down plans that were mismatched with local realities.

**Figure 5.5 The tree – A polyphonic construction**



Source: Plan federativo (2016)

However, reaching a shared understanding of this “*new way of proceeding*” required further conceptualizing that linked the organisational past with the new “*frontiers of exclusion*” and the “*tree*”. This is evidenced in Ricardo (IFFyA federative member) opening speech of the General Assembly:

*‘We have walked a long path. The tree is the product of Lima, the leaves and branches are products from Lima and Bogota. Now [in Paraguay] we need to approve and to provide further elaboration to the initiatives presented here. We have spoken about new structures and new asphalts that lead us to new frontiers. We have found ways to move forward using inspirational images, and now we need to concretize the whole process.’*

As meetings continued, discussions elaborated on the links between the “*new way of proceeding*” and the past and present of the organisation. For example, Gemma (IFFyA member) said, “*I like the change because it is to understand Fe y Alegria from the need to rethinking ‘where the asphalt ends’*”. Similarly, Gaston (Director) explained that he likes “*the process because it is collective and leads to take risks while acknowledging that there is a path already walked*”. In the same line, Rogelio (Director) added: “*it provides a sense of continuity*”.

Even though the new strategy was radically different from previous strategic plans, agreement was established that it would not break with the past but be more adaptive to local needs and flexible so as to address the “*frontiers of exclusion*” using the “*tree*”. For instance, Arturo (Director) asserted, “*The purpose of our new strategic plan is to go back to the frontier. What we build must come from the countries – the tree indicates the path, considering the needs and capabilities of each country*”. His intervention was followed by Ricardo (Director), who underscored this view, “*new initiatives are constructed from each country’s and not from the federation’s interests.*” so they could adapt to dynamically changing situations. In sum, IFFyA members would be able to construct new initiatives based on the “*frontiers of exclusion*” to be continually added as new “*leaves*” so, they could stay truthful to IFFyA’s mission.

### 5.6.3.2 Walking the path / the continual reconstruction of the future

The strategic review process had prominently established the *'tree-frontiers'* metaphor as a central guiding image for imagining the organisation's future. The *'tree'* image was now prominently displayed in IFFyA's offices and used in internal and external communications, entering everyday language when talking about future plans and initiatives. Although the tree was there, IFFyA members were aware of the risk that the metaphor could simply become a reified image and lose its ability to stimulate creative imagination about the future. In meetings we observed, they reminded each other that they would have to continually rework the metaphor to keep it alive: *"The proposal of the tree and the frontiers will have an impact as long as you make them alive; otherwise we may come back to what we know and may lose relevance..."* (Ernesto, Federative). In this sense, the metaphors had to be understood as a sensemaking device to continuously search for *"new frontiers"* and imagine innovative initiatives as *'leaves'* on the *"tree"*. Only in this way could the strategic plan be understood under a new way of proceeding.

Keeping the metaphors alive was crucial for IFFyA members. In April 2018, IFFyA members (National directors and middle managers) met again to discuss the following steps of the IFFyA strategy in Ilhéus (Brazil). Participants were welcomed by a prominent image of a leafless *'tree'* at the entrance of the meeting room and were asked to write their names onto the leaves (Figure 5.6).

**Figure 5.6 Embedding the tree in the organisational life**



After this, the first meeting of the General Assembly started and Ricardo (IFFyA member) used the outcomes of the “*tree*” and “*the frontiers*” (initiatives) to elaborate on what the new way of proceeding had meant in practice over the last 11 months. His presentation emphasized three aspects. Initially, he differentiated between the “*initiatives*” that were new and the ones that were aligned with the previous federative plan. Then, he moved to explain which initiatives were micro and which demanded global action. Finally, he opened the discussion to ask diverse reflections about the “*new way of proceeding*”.

Members quickly engaged in lively discussion. For instance, Juan (Director) commented that the “*tree*” not only allowed them to make sense of a “*new way of proceeding*”, but that it also created a strategic path as a trajectory: ‘*El camino se hace caminando*’ (‘you construct the path by walking the path’). Similarly, a former National Director explained that the precise content of the strategic plan would only reveal itself by moving forward: ‘*This is a good time to gain strength and move forward, always forward, always beyond. It is by moving forward that we deepen our awareness of what we truly are as IFFyA*’ (Anacleto, a former IFFyA director).

Discussions in the General Assembly series of meetings established that the ‘*tree*’ and “*the frontiers*” not only provided a sense of direction, but also allowed for constantly questioning the future. In words of Lazaro (Director), as “*new initiatives can emerge we can continuously read our contexts to respond to unfolding situations*”. Thus, initiatives can be inserted into the ‘*tree*’ or cut from it at any moment in time: ‘*the roots are the countries, the branches are the teams working on initiatives, and the leaves are initiatives. Countries do not change, teams might change, and the initiatives move the organisation forward*’ (ethnographic notes from the observation of a meeting, Ilhéus, Brazil, April 2018).

At the end of the General Assembly in Ilhéus (Brazil) directors remembered a process of strategic review that started in Barranquilla (Colombia), back in October 2015, and that finally came to a satisfactory conclusion (PowerPoint presentation shared with the authors). During this process, IFFyA members used metaphors as alternatives “*to break away from hierarchical structures and organisational practices developed over many years that constrained strategic action*” (transcript from ethnographic observation in Ilhéus, Brazil). Specifically, the ‘*tree*’ and the ‘*frontiers*’ metaphors allowed IFFyA

members to “*point towards a future not necessarily related to the past*” in which “*past knowledge and experience might prove useless*” (ethnographic notes from the observation of a meeting, Ilhéus, Brazil, April 2018).

In sum, during the strategic review process, two complex metaphors had emerged allowing IFFyA members to continuously make sense of the future. These metaphors not only allowed IFFyA members to reconceptualise its foundational image of ‘*where the asphalt ends*’ with new relevance without deviating from the original mission, but also to continuously redefine and reconstruct the future in order to address changing and diverse manifestations of marginalization and exclusion encountered in different local contexts.

### **5.7 A process model for prospective sensemaking**

Our findings revealed the central role of metaphors in helping actors overcome a deadlock in their ability to imagine the future in the face of wicked problems. The incorporation of insights from metaphor theory can advance prospective sensemaking in ways that address the ‘*paradox of projective agency*’. Metaphors allow the unknown to be embraced through the known.

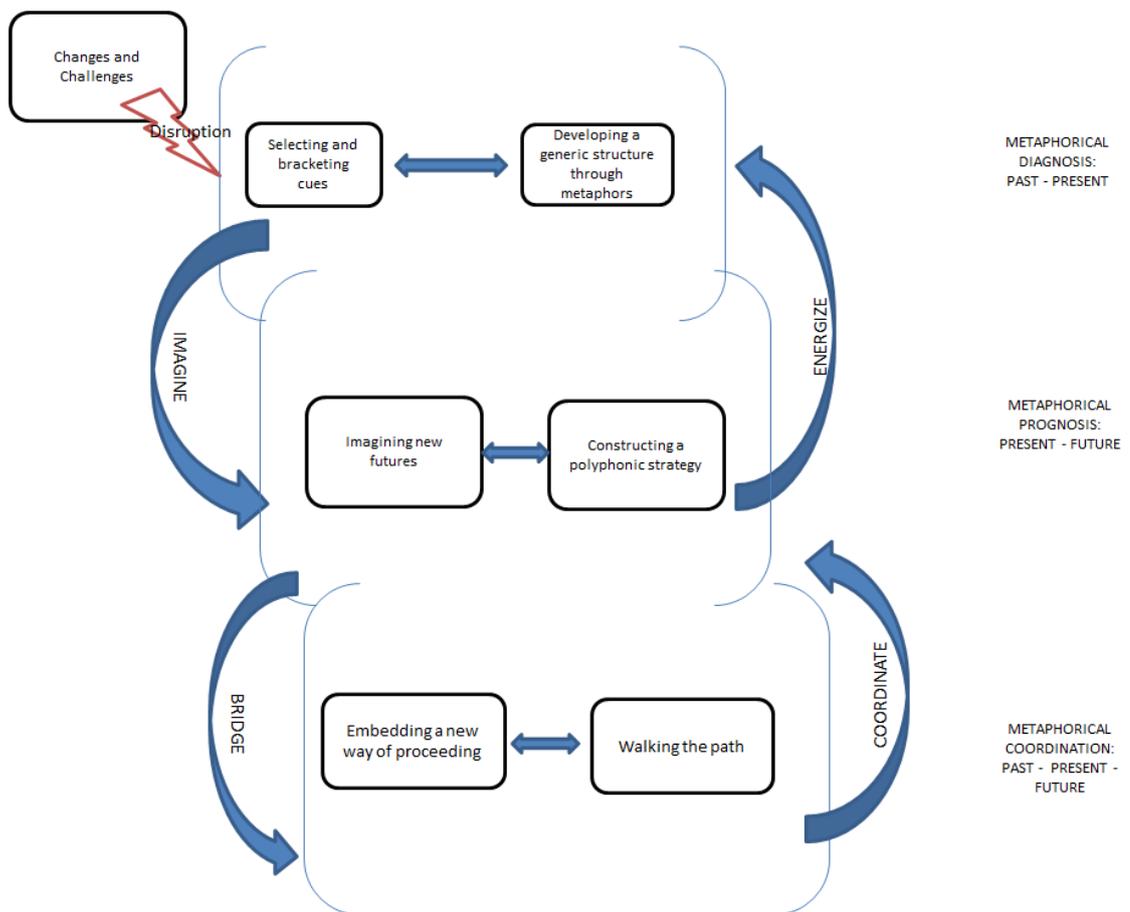
Based on our analysis, we suggest a process model for prospective sensemaking, based on the construction of metaphors; with three stages (see Figure 5.7). The first stage is metaphorical diagnosis. It delineates how actors select and bracket cues to understand what disrupted sense. Using metaphors, specifically by developing a generic structure such as ‘*the federation is a tree*’, actors interact using different logics and perspectives to recover sense. During this stage, correspondences between different domains are mapped. As an example, the correspondences between the ‘*tree*’ and the ‘*federation*’.

The second stage is metaphorical projection. In this stage, metaphors are used to stimulate projective agency. Metaphors are generative as they stimulate novel ways of describing or representing an unknown object, event or situation (target) in terms of a known one (source) (Black, 1962). Here, through metaphorical blending, the characteristics of both domains (‘*tree*’ and ‘*federation*’) give rise to a “*new meaning (...) that is not simply a composition of meanings that can be found in either the target or source concepts*” (Cornelissen, 2005, p. 758). As a result, actors stimulate imagination that leads to the creation of multiple paths for future action. In our case, by blending the characteristics of

a 'tree' and of the 'federation', actors created a new meaning, the 'network'. Actors did not know how a network would function in practice; nor did they know how the network could solve the wicked problem of poverty. However, looking at the federation as a network allowed them to embrace the unknown and embark on a trajectory that points towards the future.

The third stage is metaphorical embedding. In this stage, actors integrate imagined futures onto past and present experiences to generate plausible constructions. As the future is constructed in terms of what will be happening, actors do not close sense of the future. Instead, the future is kept as a malleable construction that accounts for potential discoveries and future potentialities.

**Figure 5.7** A process model for prospective sensemaking



**Metaphorical Diagnosis.** The first process of the model of future-oriented sensemaking relates to the confrontation of the challenges that disrupt members' ability to imagine the future as a simple continuation of the present and the past. In line with sensemaking

literature, actors select and bracket cues from the environment to clarify what is going on (Sandberg and Tsoukas, 2015; Weick, 1995). These disturbances trigger the need to recover a sense of “reality” (Maitlis and Christianson, 2014). In our case, FyA members identified internal tensions (one fits-all) and exogenous changes (new forms of poverty) as the problems interrupting sensemaking.

During this process, metaphors (E.g. ‘tree’ and ‘frontiers of exclusion’) emerge as key elements to recover sense for diverse actors. In the diagnosis process, actors should develop a generic structure of the metaphor. In other words, actors should select the domains (E.g. ‘tree’ and ‘federation’) and map the correspondences between them to create a metaphor. As more actors interact in dialogue, multiple beliefs, understandings and rationalities give rise to a complex metaphor that combines several meanings in one structure. Thus, metaphors are useful for recovering sense as they “invite us to see similarities and differences between two concepts” (Cornelissen, 2005, p. 755).

***Metaphorical Projection.*** The second process outlined in our model is fundamental to untangle the ‘paradox of projective agency’. Metaphors enable actors to make sense of the future through projective agency. In other words, metaphors allow actors to imagine alternative possibilities while shaping and directing future action (Emirbayer and Mische, 1998). While actors are limited in what they can know by their past experience, metaphors can propel actors to move from the known (past/present) and to imagine the unknown (future). This achieved by leaving enough openness so as not to restrict imagination about the future to a single narrative. Emirbayer and Mische (1998, p. 989) explicate the link between metaphors and projective imagination: ‘projective imagination works in a way analogous to the capacity of metaphor to create semantic innovation, it takes elements of meaning apart in order to bring them back together again in new unexpected combinations’. This occurs in two interrelated processes.

First, as opposed to representing future events as if they have already occurred, metaphors open up imagination through metaphorical blending (Biscaro and Comacchio, 2017; Cornelissen, 2005). After a generic structure is developed in the diagnosis phase, actors bring the selection of particular aspects of the source (E.g. the ‘tree’) that in conjunction reorganize the target (E.g. ‘federation’) allowing the emergence of new meanings (E.g. ‘initiatives as leaves of the tree’). The emergent meaning cannot be reduced to the either

the source or the target; instead, it is conceptually connected to them in a new independent structure (Fauconnier and Turner, 1998). This explains how metaphors enable projective agency (Emirbayer and Mische, 1998), allowing actors to make sense of and to construct novel ideas, projecting themselves towards the “*unknown*” with resources from the “*known*”.

Second, the participatory process of constructing metaphors via dialogue allows the projection of multiple meanings for different actors. In this sense, metaphors represent several voices without privileging one (Bakhtin, 1985). For instance, when referring to the ‘*frontiers of exclusion*’, each national FyA will have at least one voice and the metaphor will have an overarching meaning for all members. Thus, metaphors, and the several meanings they carry, allow actors to craft and recraft the future as diverse paths to walk (Mische, 2009). In these paths, actors will have a sense of bonding provided by the metaphor but can imagine diverse future possibilities. In overall, metaphors exhibit a plurality and openness of meaning, or “*interpretive viability*” (Cornelissen, 2005, p. 753), allowing different actors to associate different meanings with the same metaphor.

***Metaphorical Embeddedness.*** Finally, the third process explains two interrelated activities. First, how actors connect the imagined multiple futures to the current flow of experience and organisational history. The imagined futures need to be plausible; they cannot be unrealistic utopias, disconnected from the perceived present or disruptive of organisational history. This process is done through metaphors. Metaphors link the “*known*” with the “*unknown*”, providing the necessary “*fit*” to be embedded into current or known trajectories. In our case, the interplay of the “*new frontiers*” and the “*tree*” explains how new initiatives brought by IFFyA members make sense in their contexts while respecting IFFyA history. As Mische (2009) argues, actors are creators of new projects, but their volition is neither unfettered nor too fettered. Thus, the imagined futures that are plausible are those in which actors can vary the themes enough to make them into a new theme altogether.

In the second activity of metaphorical embeddedness, actors move from the ‘*future perfect tense*’ to conceive the future as ‘*unfinalisable*’. This occurs in the ‘*future continuous*’ tense: an ongoing process in which actors continuously construct changing and alternative possibilities for the future. While imagining the future as if it has already been

achieved creates a sense of certainty, thinking about the future as ‘*unfinalisable*’ is much more challenging. Metaphors maintain the future open-ended and malleable, while at the same time provide devices that orient action (Biscaro and Comacchio, 2017). The interpretive viability of metaphors provides openness without closing sense of the future. Metaphors provide enough room for actors to creatively reconfigure the future based on hopes, fears and desires (Emirbayer and Mische, 1998). For instance, the “*frontiers of exclusion*” metaphor includes current forms of gender, demographic and geographic discrimination, while leaving room for new forms of poverty and marginalization that might unfold as the ‘*unknown*’ future unfolds. By not closing what ‘*frontiers of exclusion*’ means, IFFyA actors allow multiple meanings to be captured by the metaphor as the multiple contexts in which the organisation operates unfold. Therefore, although how the future will unfold is unknown, it can still be embraced through a metaphor that is capable of linking the ‘*known*’ (what is exclusion today and what has been in the past), with the ‘*unknown*’ (how will new forms of exclusion unfold).

## 5.8 Discussion

Our study examined how organisational members make sense of an unknown and unknowable future in the context of wicked problems. While some scholars have insisted that sensemaking may be future-oriented and occur through retrospective processes in the future perfect tense (Gioia and Mehra, 1996; Weick, 1979), we follow calls to reconceptualise prospective sensemaking beyond a retrospective framework (MacKay, 2009; Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015). To do so, we presented the case of IFFyA, whose strategic review process illustrated the search of a unifying future-oriented vision of development in the face of fast and radical socio-economic changes.

IFFyA faced a twofold challenge. First, addressing a wicked problem (poverty and exclusion) meant that actors needed to imagine radical alternatives to current reality while facing high levels of uncertainty. Second, actors had to devise a unifying strategy while accommodating radically different contexts where one-size-fits-all solution would fail to tackle the multiple manifestations of the wicked problem. This dual challenge required them to treat the future as contingent and embrace the multiple potentialities that they

could not yet foresee. Hence, retrospection failed to offer plausible guidance for meaningful collective engagement with the future.

Our real-time study of IFFyA's strategic review process revealed the generative role of metaphors in helping actors break free from past constraints and make sense of the future. Actors were constrained by the present conceptualization of their mission (in our case the literal meaning of "*where the asphalt ends*"), and unable to make sense of the future beyond this known concept. The capacity of metaphors to create semantic innovation and provide metaphorical language to expand literal meaning was critical in helping actors extend their imagination beyond what is already known. The production of the metaphor was both a discursive process of creating a plausible narrative, a creative process of visualizing the metaphor through creating an image of the tree, and at times even an embodied process of drawing leaves and placing them on the tree. By unpacking the processes involved in constructing metaphors, our study sheds light on the role of metaphors in imagining a future that is unknown and contingent, instead of being a repetition of past events.

#### *5.8.1 Implications for prospective sensemaking*

Scholars studying sensemaking have argued for the need to rethink the Weickian perspective of prospective sensemaking to account for the open-endedness of the future (Sandberg and Tsoukas, 2015). However, "*scholars continue to debate the meaning and distinctiveness of a truly prospective form of sensemaking*" (Maitlis and Christianson, 2014, p. 97). Our work aids in this effort by expanding our understanding of temporality in prospective sensemaking. This is achieved by conceptualizing the notion of "*future continuous*" tense, and by theorizing the role of metaphors in this process. Three significant implications emerge.

First, we add to the understanding of temporality in prospective sensemaking by expanding the temporal spectrum beyond the "*future perfect*" tense and theorizing the role of the "*future continuous*" tense. Sensemaking in the "*future perfect*" tense may be appropriate to engage with the future in relatively stable environments. Moreover, where strategy makers have control over their material and social contexts and where there is in-principle agreement on a desired outcome (Pitsis et al., 2003) that hence "*appear to be*

*under the control of the plan*” (Weick, 1979, p. 102). But in situations where goals are unclear, and rapidly changing and complex environments render the future more precarious, relying on experience is likely to suffer from biases, cloud imagination through “hindsight” and lead to “*foresightful thinking flaws*” (Lord et al., 2015; MacKay and McKiernan, 2004, p. 75). Attempts at controlling and predicting the future all too easily fall into the trap of viewing the future as a mere extension of the past, hence ignoring the many sets of unrealised potentialities and alternative states (Lord et al., 2015).

Here, prospective sensemaking in the “*future continuous*” tense and treating the future as contingent and precarious, offers a more nuanced understanding of how actors make sense of the future in complex and uncertain contexts. We argue that this is an important expansion to understand prospective sensemaking in our current times, which are built in an unprecedented level of instability and insecurity into its very structure, as illustrated by ideas such as “*liquid modernity*” (Bauman, 2013) or “*risk society*” (Beck, Lash and Wynne, 1992). Unlike a traditional society that “*orders time in a manner which restricts the openness of counterfactual futures*” (Giddens, 1991, p. 47 quoted in Tavory and Eliasoph, 2013: 927), our current times destabilize naturalized futures by making “*extreme demands for people to constantly readjust their expectations*” (Tavory and Eliasoph, 2013, p. 927) of a future that seems to be constantly shifting and changing. This requires actors to constantly re-evaluate their expectations of the future in the face of ever-changing social and political trends, fashions and technologies, and be prepared to re-orient constantly themselves toward multiple possible futures. It is only when actors contemplate the future as indeterminate that they can envision several potentialities and alternative states in different scenarios (Lê, 2013).

“*Future continuous*” thinking is also critical for organisations dealing with wicked problems, where goals themselves are contested because the definition of the problem is precarious and needs continuous adaptation to changing circumstances (Ferraro et al., 2015; Reinecke and Ansari, 2016). As problem-definition and potential solutions are always only provisional and contingent on changing circumstances, actors need to continuously re-evaluate their actions. At IFFyA, actors experienced a myriad of different and constantly shifting manifestations of exclusion, from poverty to gender and gang

violence, which required them to constantly re-orient themselves toward changing problems and, hence, changing paths of future action.

The future continuous tense also relates to calls to think of sensemaking not only as an episodic moment triggered by equivocal events or crises, but as an ongoing process as a result of “*being-in-the-world*” (Sandberg and Tsoukas, 2015, p. 343). Actors do not episodically engage with the future, but “*are continuously performing and recalibrating their futures*” (Emirbayer and Mische, 1998, p. 984; Tavory and Eliasoph, 2013, p. 936). Prospective sensemaking then is not an episodic moment of making sense of “*what will have happened*”, but an ongoing construction of what “*will be happening*”.

The second implication of our model is that, despite attempts to go beyond Weickian approaches to sensemaking, and avoid reducing prospective sensemaking to a retrospective process (Sandberg and Tsoukas, 2015), the existing literature still struggles to explain how actors can imagine the “*unknown*” with cognitive resources from the realm of the “*known*”. We called this the ‘*paradox of projective agency*’. Our findings highlight the role of metaphors in stimulating projective agency by projecting schemas drawn from the realm of the known into the realm of imagination. Metaphors can provide sensemaking devices that fuse realms of experience and imagination (Cornelissen, 2005; Cornelissen et al., 2008). This can create a plausible temporal linkage between present moments of experience from which cues are extracted, retrospective interpretation and projective imagination. Actors can thus envision new states despite using existing knowledge, mental models and experiences (Biscaro and Comacchio, 2017). Thus, metaphors have the potential for stimulating what Emirbayer and Mische (1998) call the projective dimension of agency, namely the actors’ capacity to conceive realities and potentialities beyond what is already known. Through the collective construction of metaphors, actors can then “*move ‘beyond themselves’ into the future and construct changing images of where they think they are going*” (Emirbayer and Mische, 1998, p. 984).

In our case, IFFyA’s *raison d’etre* is to catalyse substantive change in contexts of exclusion and marginalization. This requires creativity and reflexivity, but at the same time a plausible direction of where IFFyA is going in order to cope with the uncertainty of an unknowable future: exclusion and marginalization take new and unexpected forms,

that might depart from the forms IFFyA is used to work with and which have been mainly associated with material exclusion. As material exclusion is reduced, new and unexpected forms of exclusion might emerge. While sensemaking scholars have highlighted the role of symbols, including visionary images and metaphors, in facilitating and legitimizing strategic change (Gioia et al., 1994), our research highlights the generative power of metaphors to help decision makers envision how they imagine the future might unfold. Just as the physicality of material artefacts extends the capacity of individuals and groups to process mental content and develop new mental models (Stigliani and Ravasi, 2012), metaphors help actors to consciously engage with the future by interrelating experience and imagination.

The third implication of our model relates to the role of polyphony (Cunliffe et al., 2004; Vaara et al., 2016) in prospective sensemaking. In contrast to studies where problems about future trajectories are resolved through a dominant position (cf. Dawson and Christopher, 2016) or temporal settlements that create one vision of the future emerge (Kaplan and Orlikowski, 2013), our findings show that organisational actors do not necessarily have to agree on which future to hold in their imagination to coordinate their actions. In heterogeneous network organisations, such as IFFyA, a homogeneous vision of the future may not be desirable. Polyphony in prospective sensemaking enables actors to imagine multiple futures without privileging a dominant one.

However, in order to enable any form of collective organisational action, “*actors have to share an image of a future together, even if implicitly—at least enough to coordinate action, if not necessarily enough to coordinate thought or desire*” (Tavory and Eliasoph, 2013, p. 909). Due to their “*interpretive viability*” (Cornelissen, 2005, p. 753), metaphors allow for the ‘*multiplicity of independent and unmerged voices and consciousnesses (...) each with equal rights and its own world*’ (Bakhtin, 1984, p. 208) to co-exist when imagining an organisational future. Since different actors can imagine and project towards different versions of the future, metaphors do not restrict the openness of the future as potentiality (Lord et al., 2015). On the contrary, they encourage the creation of multiple paths in forms of narratives or stories that act as recipes for action and thought (Colville et al., 2012).

### 5.8.2 *Future research*

By conceptualising prospective sensemaking in the future continuous tense, we have just begun to appreciate the role of temporality in (prospective) sensemaking. Here, different temporal planes may underpin different types of projective sensemaking. For instance, Tavory and Eliasoph (2013) propose three different aspects of future making: protentions, trajectories, and temporal landscapes. When making sense of one's immediate future as in protentions, prospective sensemaking is likely to be a continuous moment-by-moment anticipation that is guided by an embodied "feel" for the immediate future. When making sense of temporal trajectories, the role of "narratives" and "stories" could help actors to place themselves within larger time frames. When a taken-for-granted temporal landscape crumbles, such as a career or an initially successful start-up, prospective sensemaking may involve actors having to piece together a new temporal landscape in ways that may radically recalibrate expectations about the future to recover meaning. Future studies can investigate these different types of future making in prospective sensemaking in setting where they interact or clash and explore how actors coordinate them in order to make sense of action together.

Our findings indicate that metaphors are generative when they were constantly debated. During the strategic review process, IFFyA members collectively created and re-created metaphors. As a result, metaphors energized imagination and polyphony. However, metaphors can also be a cognitive trap that constrains imagination. In our case, the guiding image of the "*asphalt*" had initially tied imagination to an outdated image of the organisation that only existed in memory. Metaphors lose their generative power when they become too familiar and pass unquestioned (Tsoukas, 1991): they lose the power of helping to imagine the "unknown." Hence, metaphors are likely to be generative only as long as the collective process of metaphor construction and re-construction keeps going on. If the metaphor is kept "alive," different new meanings can emerge, allowing actors to imagine alternative courses of action.

Finally, metaphorical thinking may have been so salient because of our context. Strategy making at IFFyA, a faith-inspired organisation operating in Latin America, takes place in a context in which metaphors play an important role in religious scriptures and everyday language. Yet, research has recognized the role of metaphors in strategy and change

(Cornelissen et al., 2011; Gioia et al., 1994) and organisational processes more generally (Biscaro and Comacchio, 2017). Moreover, while in our context we found that metaphors were the trope that allowed actors to propel themselves into an unknown future, future research could explore the role of other tropes or artefacts in stimulating projective agency. This points to the role of narratives – stories where temporality forms a necessary part of the dramatic structure – to create narrative connections between familiar knowledge and imagination of something radically new (Boje, 2011). Similarly, visual artefacts such as sketches, design templates or other visualizations can facilitate prospective sensemaking by supporting cognitive processes and help in the imagination of new mental models (Stigliani and Ravasi, 2012). However, some tropes or images may also be more suitable for prospective sensemaking than others. Analogies, for instance, stress similarity to existing schemes, and hence promote conformity and isomorphism rather than creativity and imagination (Etzion and Ferraro, 2010). Hence, future research can explore whether and how the interplay of different artefacts can enhance, or constrain, different types of forward-looking behaviours.

## Chapter 6 Conclusions

The motivation for this doctoral study has been to understand *how organisational actors deal with the future in contexts dominated by dynamic changes and contested views as in the case of wicked problems*. This motivation arose from the need of comprehending processes of meaning construction and action used for organising and strategizing in modern organisations. To analyse these processes, I have focused specifically on poverty as a wicked problem that is extremely complex to solve because of its intertwined and non-linear dynamics. As pointed out in the Introduction chapter, modern societies have engaged with the future as something that has to be conquered. Although this notion has pervaded organisational thinking, problems such as poverty provide an extreme setting in which to observe meaning construction and action in futures that are probably not conquerable. In what follows, I first present the main findings of each paper while answering the research question of this thesis. Then, I present the contributions to theory, in terms of sensemaking and wicked problems literature. I start by discussing the differences between the construction of images of the future and the narratives that form them. Subsequently, I explain the importance of polyphonic authorship in decolonising the future. At a practical level, I turn to the notion of unfinalized futures and the role of metaphors to explain how organisations can deal with the future in less rigid ways through glocalised and multi-authored responses.

### 6.1 Answering the research question

At the beginning of this thesis, I introduced the following, overarching research question:

*“How do organisational actors deal with the future in contexts dominated by dynamic changes and contested views as in the case of wicked problems?”*

Let us revise the three papers to explain how each contributed to answering this question, before returning to the question above to provide a composite answer. In the first paper (chapter 3), I reconstructed the history of Fe y Alegria (FyA), a religious NGO that alleviates poverty through education in different locations. This analysis starts from its foundation in 1955 in Caracas (Venezuela) and finishes at its expansion into Guinea (Africa) in 2016. The purpose of this paper was to unveil how actors at FyA organised themselves and adapted to the changing manifestations of poverty. The changing

manifestations of poverty challenged the notion of a conquerable future because of its non-linear dynamics and contested meanings in terms of definition and consequences. Briefly, through the analysis of organisational narratives, I unveiled seven responses that members deployed while dealing with the changing manifestations of poverty. These responses are divided into two categories: the ones that related to distributed experimentation (Ferraro et al., 2015) and those that related to collective action (George et al., 2016; Olson, 1965).

In the case of the responses relating to distributed experimentation, the responses emphasised four key notions. First, when dealing with changing manifestations, actors needed to think outside the box. This is because there will be always incomplete information about the problem, causes, and consequences actors need to imagine and therefore they must go beyond what is known. Second, when resources are limited, using constraints to create opportunities allows actors to rediscover their contexts while reanalysing how to project towards the future. Third, although the future will be always precarious, this does not mean that actors always have to start imagining from scratch. In this respect, translating previous experiences contributed to identify a problem and selecting specific previous responses while adapting them to local contexts. Finally, in dealing with changing manifestations of poverty, iterative action contributes to avoiding a fatalist view in which the future is chaotic. Overall, responses relating to distributed experimentation illustrated that when dealing with the future, it is important to create small wins based on provisional goals while discovering, learning, and adapting to the context.

In the case of collective action, the case of *Fe y Alegria* revealed three important responses. First, the need to create participatory structures that allow coordination and action of multiple actors. By constructing a federation, *Fe y Alegria* members not only created a sense of membership but also avoided exhausting resources while aligning for future action. Second, in contested futures, working with multiple actors to understand their positions is the only way to find and articulate meaningful responses. Finally, when managing the changing manifestations of poverty, actors have to be open to complementary responses. This is because there is no single solution that solves the problem. Overall, responses related to collective action revealed that when dealing with

the future is important the creation of structures that enhance participation of multiple actors while unveiling multiple futures. In conclusion, paper 1 (chapter 3) revealed the need to better understand how actors create small wins and how participatory structures allow the decolonisation of the future.

In the second paper (chapter 4), I studied the different ways in which members of FyA made sense of the future. To do so, I analysed the narrative constructions of actors' expectations using the sensemaking perspective (Weick, 1995). In this analysis, expectations were crucial for understanding strategy making and the problems it encounters when dealing with the future. In short, actors' expectations differed in the way members connected events to present them in a story way (*narrative forms*), how events are sequentially linked (*narrative orientation*), and how much room for changing the future have (*future openness*). Put simply, actors selected cues and interpreted meaning in vastly different ways, affecting their enactment. This identification allowed me to analyse the differences between different types of expectations and their constructions. For example, while project managers have stable expectations about the future, national directors are more inclined to have volatile ones. Having such diversity during strategy making unveiled the problems of composite narratives associated with plans or projects. While composite narratives make the future more manageable, they might obscure historical, cultural, and relational experiences that guide actors' images of the future. In other words, composite narratives do not necessarily translate into composite expectations of the future.

Finally, in the third paper (chapter 5), I investigated how actors collectively overcame the tension identified with composite narratives for the future in paper 2 (chapter 4) inside the International Federation Fe y Alegria. I found that the dialogic construction of metaphors helped organisational members, who faced different and shifting manifestations of poverty in extreme contexts, to imagine an open-ended and polyphonic organisational future. Put simply, metaphors that are constructed collectively without imposing specific meanings allow multiple actors to enact varied futures. In conclusion, this paper offers two contributions to the research question of this thesis. First, there are linguistic/cognitive objects such as metaphors that bind actors around one purpose but that are open enough to be interpreted in different ways, allowing them to continually

reorient themselves towards multiple possible paths of future action. Thus, in dealing with the future in contested and dynamic contexts, actors do not necessarily have to agree on which future to hold in their imagination to coordinate their actions. This is extremely important in organisations where the future is usually contested, and action requires contextual responses. Second, dealing with the future in contested and dynamic contexts is more effective using a future continuous orientation. The future continuous orientation in contrast with the future perfect thinking (Weick, 1969) does not involve seeing the future as a place to be reached. In the future continuous orientation, the future is contingent and precarious, so people do not need to restrict the openness of counterfactual futures nor feel fearful of readjusting expectations based on present discoveries. The future continuous orientation is not an episodic moment of recovering a sense of “*what will have happened*”, but an ongoing construction of what “*will be happening*”. Thus, actors are “*continuously performing and recalibrating their futures*” (Emirbayer and Mische, 1998, p. 984; Tavory and Eliasoph, 2013, p. 936). Overall, the paper’s main argument is that in order to reclaim the openness of the future, actors need to acknowledge that the future is not a singular future (e.g. composite narrative) but a multiplicity of futures (grounded in different contexts and stories) that are happening simultaneously.

Having summarised the three papers, I can now provide a composite answer to the research question. First, in order to deal with the future in contexts dominated by dynamic changes such as in the case of wicked problems, actors must reclaim the temporal nature of the future. This is achievable by leaving behind the conception of a conquerable future and embracing the notion of a multiplicity of futures that may or may not come into being. Moving away from a conquerable future allows an understanding of the future as something that will be happening (on the discovery) and something that is not fully finished (always precarious and incomplete). In addition, reclaiming the temporal nature of the future allows a movement away from linear and unidimensional conceptions to non-linear and multidimensional notions of time, in which the future is not only the “product” of causal events but also the convergence of multiple possibilities. Second, when dealing with contested futures, linguistic/cognitive objects such as metaphors allow the construction of multiple narratives in which actors do not necessarily have to agree on which future to hold. As meaning about “*what [...] has not yet happened so has not yet come into being*” (Dawson and Christopher, 2016, p. 3) is created and interpreted

vastly differently by diverse actors, the interpretive viability of these objects allows a sense of binding while providing enough room for contextual responses. Without both, reclaiming the nature of the future and acknowledging that multiple futures can coexist, organisational actors would face problems in terms of strategy making, as illustrated in paper 2 (chapter 4).

## **6.2 Contributions to the sensemaking literature**

In this section, I will highlight the main contributions to theory of this thesis. The overall contribution to prospective sensemaking scholarship is expanding our understanding of how actors deal with the future. As introduced in chapter 2, traditional sensemaking scholarship has been characterised by its retrospective account of the future (Weick, 1995; Weick et al., 2005). This retrospective nature has influenced how the future is understood, namely according to future perfect thinking, a temporal mode in which the future is conceptualised as already having been experienced (Fuglsang and Mattsson, 2011; Pitsis et al., 2003). However, some scholars (Brown et al., 2015; Maitlis and Christianson, 2014; Sandberg and Tsoukas, 2015) have called for a better understanding of the future in sensemaking. Responding to such calls, the doctoral research contributes to prospective sensemaking as follows. First, it theorises the differences in meaning constructions of the images of the future. In the context of prospective sensemaking, images of the future are intertwined with individuals' practices, desires, hopes, fears, and experiences. These images of the future are expressed through expectations, while practices, desires, hopes, fears, and experiences are expressed through narratives forms. In this intertwining, the future is narrated in dissimilar ways affecting actors' expectations.

Second, it moves away from the traditional future perfect thinking as the dominant temporal mode of engaging the future and towards theorising engagement with a more open-ended and multi-authored notion of the future. This notion is referred to as the future continuous orientation, that is, an ongoing construction of what "*will be happening*". The need to make this move arose from the observation that in the context of wicked problems, retrospection based on the past does not provide a plausible guide to the future because "*what has happened in the past may be at best misguided and, at worst, pathological*" (Brown et al., 2015, p. 272; Colville et al., 2013). Finally, I discuss the contribution of metaphors in the context of distributed sensemaking. In the context of wicked problems

where meaning is extremely contested reaching a settlement that satisfies all actors is nearly impossible. However, through the multi-authored construction of metaphors, different actors can have an image that ties them while they diverge in action. Below, I discuss each contribution in detail.

### 6.2.1 *Images of the future and narratives in prospective sensemaking*

The first contribution of this doctoral research is to theorise the role of the intertwinement of narratives and expectations in prospective sensemaking. Recent research on prospective sensemaking (Konlechner et al., 2018) has started to reveal the power of expectations. By identifying the role of narratives (Brown et al., 2015) in the formation of expectations in prospective sensemaking, this research shows that the future in sensemaking is highly influenced by actors' conceptions of time and practices.

Although Weickian sensemaking is grounded on temporal relations, the existing literature has privileged linearity and fixed temporalities, overlooking timelessness, discontinuity, and multiplicity of temporalities (Dawson and Sykes, 2019; Wiebe, 2010). Acknowledging these differences is important for the sensemaking perspective as actors' understanding of time and practices affects the way they think about, decide on, and enact their social worlds (Brown et al., 2008; Dawson and Sykes, 2019). As Emirbayer and Mische (1998, p. 964) argue, actors are "*embedded within many such temporalities at once [...] oriented toward the past, the future, and the present at any given moment, although they may be primarily oriented toward one or another of these within any one emergent situation*".

In particular, the research provides an overview of the differences between the images of the future and the individuals' practices, desires, hopes, fears, and experiences that construct them. In the context of prospective sensemaking, these images and individuals' experiences are always intertwined. These images of the future are expressed through expectations while practices and experiences are expressed through narratives.<sup>43</sup> Papers 2 and 3 (chapters 4 and 5 respectively) show that in this intertwinement, the future is

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<sup>43</sup> Although I acknowledge the difference between narratives and stories, during this discussion the term narrative is used to refer to both. This is grounded on the assumption that all stories are narratives (Dawson and Sykes, 2019; McArthur, 1992).

narrated in dissimilar ways affecting actors' expectations. In this sense, narratives as vehicles of sensemaking (Brown et al., 2008) reveal multiple understandings of time, in which the past, the present, and the future interweave in different forms, creating different combinations. Drawing upon different temporal connections means that the creation and interpretation of the meaning of the future, as well as its enactment, varies. In contrast with the past and the present, the future is a temporal dimension that has not yet been experienced, and thus it is a dimension that has to be imagined to feel it as experienced (Dawson and Christopher, 2016). This means that all the narratives and expectations that aim to grasp the future are products of the imagination. However, when narrating the future, we can find at least three different types as presented in paper 2.

Considering previous research, we can find the Weickian narrative type for the future, which is grounded on finalised retrospective narratives (Dawson and Sykes, 2019). These narratives seek to imagine the future in terms of past experiences; here the actor constructs meaning based on clearly defined plots that provide causal explanations. In this sense, Weickian narratives of the future follow the Aristotelean convention of a clear beginning, middle, and end (Dawson and Sykes, 2019). In Weickian narratives of the future, it is clear that the actor tries to impose certainty to feel he has control over the future. As such, these narratives usually form stable expectations about the future that sometimes become cages for action (Colville et al., 2012). However, this Weickian type of narrative has a fixed temporality that leaves no room for external changes or for actors' discoveries (Elkjaer and Simpson, 2011) and in terms of power may reproduce hegemonic meanings (Allard-Poesi, 2005). Thus, Weickian narratives serve to control and marginalise people (Brown, 1998; Brown et al., 2008), time, and images of the future.

There is a second type of narrative. These narratives usually refer to a future that is already in motion but at the same time is a constant question. These types of narrative follow cyclical dynamics, drawing upon a past that is often nostalgic and an unknowable future that is a mixture of optimism and pessimism (Dawson and Christopher, 2016). In these narratives, dealing with the constant question of the future is possible through deliberation with others or with oneself and the exigencies of lived situations. Interestingly, in these narratives, actors do not try to impose certainty on the future but engage with it as a continuous question that often adheres to actors' emotional tone (Boje et al., 2016). As

such, these narratives emphasise short-term futures that form contingent expectations. In this contingency, expectations will always be based on the momentary experience of actors.

There is a final type of narratives of the future that is characterised by its unfinalized nature (Boje, 2011). These unfinalized narratives that are forward looking or, as Boje (2011) calls them, bets for the future, do not fix time, are not linear and are indeterminate. In these narratives, the imagined future is portrayed as a ramification of multiple events that converge, diverge, disappear, may never come into existence, or are never fully experienced. Thus, these narratives are messy and are often presented in different parts that have excessive temporal holes, leading to the fragmentation of the illusory linearity of time. Overall, these unfinalized narratives form volatile expectations in which actors “*move ‘beyond themselves’ into the future and construct changing images*” (Emirbayer and Mische, 1998). In contrast with the two other types of narratives, unfinalized narratives privilege modality and alternative futures. Put simply, unfinalized narratives pay more attention to actors’ constructions of counterfactual, speculative, and imaginative futures. In these narratives, multiple futures can coexist in parallel as there are many possible dimensions (Dawson and Sykes, 2019). Boje (2011) also argues that these narratives can provide better understandings of how different events converge to explain possibilities and changes in social structures. Overall, the study of images of the future and narratives provides empirical information that can be used to analyse the processes of creation, interpretation, and enactment that extend the current sensemaking literature.

#### *6.2.2 The future continuous: unfinalized and multi-authored narratives in prospective sensemaking and collective processes*

The second contribution of this doctoral study is to explain the future continuous as a more open-ended and multi-authored notion of the future. The future continuous is then understood as an ongoing construction of what “*will be happening*”. The future continuous arose from the observation that in relation to wicked problems, retrospection may create more problems than the ones it may solve. The future continuous at the collective level takes place in those unfinalized and multi-authored narratives about the future that do not impose a desired version but on the contrary provide enough room for multiple images to coexist. While Weickian narratives of the future have a fixed

temporality and reduce or marginalise voices (Boje, 2011; Dawson and Sykes, 2019), in paper 3 (Chapter 5), I show how actors can start regaining the open-endedness of the future. Regaining the true nature of the future is partly possible by acknowledging that some projects will exist, others may be under way, others are not yet conceived, and others will be never completed (Elkjaer and Simpson, 2011).

Consequently, I align with Holt and Cornelissen's (2014) argument that sensemaking needs to go beyond closure and linearity to explain the concepts of absence and openness. This is not an easy task in the social world nor in terms of sensemaking for three reasons. First, it defies a core assumption of sensemaking theorising – that the process of sensemaking is about interruption, recovery, and closure (Sandberg and Tsoukas, 2015). In the future continuous, meaning is unfinalized as there is an absence of a definitive solution and actors need to be open enough to reconfigure images of the future based on hopes, possibilities that are not yet there, and unintended consequences of their actions. Second, the sensemaking literature has largely overlooked issues around power (Maitlis and Christianson, 2014) and asymmetrical positions (Cornelissen and Schildt, 2015). Thus, a way of dealing with these issues from a temporal perspective is to embrace meaning as fluid, multi-authored, dynamic, contextual, and always open to negotiated interpretations. In this regard, unfinalized narratives are crucial to move from monovocal to polyphonic<sup>44</sup> accounts in which multiple realities converge and diverge while existing simultaneously. Finally, unfinalized and multi-authored narratives allow organisational actors to move from fixed temporalities to multiple temporalities that need a form of synchronic enactment to coexist. While most of the current sensemaking literature treats time in a singular way, but the future continuous at the collective level allows actors to understand time as a multiple concept (Adam, 1990; Bluedorn, 2002).

Thus, regaining the true nature of the future may require moving from future perfect thinking in sensemaking to the future continuous, a time in which there is flux and uncertainty. In these fluid and multi-authored narratives, objective and subjective dimensions of time will interweave to offer alternative scenarios of the past and future possibilities while enabling multiple pathways (Sillince et al., 2012). Unlike the future

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<sup>44</sup> Including different consciousnesses that not only coexist but also inform and shape one another (Bakhtin, 1985).

perfect, the future continuous allows human and social practices in terms of an endless explorative search for direction and meaning, while acknowledging that human action is always directed simultaneously at the past, the present, and the future (Emirbayer and Mische, 1998).

### *6.2.3 Distributed sensemaking: when dealing with complex problems*

The third contribution of this doctoral research focuses on the role of distributed sensemaking in the context of wicked problems. As previous research has found and as it is discussed in paper 1 (chapter 3) when dealing with wicked problems, it is necessary to engage with social processes and collective dynamics (Weber and Khademian, 2008). In these social processes, meaning is crucial to create a sense of bonding to be able to engage in action regarding the problem (Dorado and Ventresca, 2013; Reinecke and Ansari, 2016). However, this construction of meaning needs to consider two main concerns.

First, it needs to go beyond a simple shared understanding, as Weick and colleagues (2005) argue, to reach a state in which actors create equivalent meanings. In this doctoral research, I have shown that creating equivalent meanings is possible through co-generative processes based on polyphonic accounts. The rhetoric of a shared understanding and consensus is dominant in discussions of collective sensemaking, specifically when explaining enactment (Weick et al., 2005). However, what makes people engage in coordinated action is not the imposed rules or procedures but understanding how each person interrelates as a system to act towards something. In other words, distributed sensemaking occurs when individuals' independent efforts align to identify capabilities, limits, and needs (Wachtendorf and Kendra, 2006; Weick, 2005). This means that it is necessary to study how the construction of meaning accounts for fragments of experience that are dispersed among several actors and not necessarily integrated in a coherent whole (Maitlis and Christianson, 2014).

Polyphony plays a crucial role in understanding how each person interrelates to operate as a system. In papers 2 and 3, I have shown that people understand the past, the present, and the future differently when dealing with wicked problems. These different understandings are partially to blame when a strategy does not go as planned. As shown in paper 2, this mainly occurs when narratives, in this case plans or projects, are reduced

to monovocal or composite accounts. These monovocal or composite accounts reduce meaning to shared understandings that do not necessarily translate into equivalent meanings for different actors. This problem of not creating equivalent meanings, which is a crucial element of success in responding to wicked problems, can be overcome, as pointed out in paper 3, allowing polyphony.

As organisational actors become more separated spatially and temporally, meanings become more contested (Maitlis and Christianson, 2014). The current literature (Balogun et al., 2015; Gioia and Chittipeddi, 1991) has pointed to the relevance of formal authority to shaping meanings and to framing processes of meaning as a solution to wicked problems (Reinecke and Ansari, 2016). This research, on the contrary, shows that equivalent meanings arise from a relational–responsive, emotional–volitional construction of meaning, as Bakhtin (1985) suggests. As paper 3 illustrates, creating equivalent meanings about poverty in different contexts is dynamic and participatory through dialogical constructions of multiple actors. Here, polyphony refers to several voices, perspectives, and subject positions interacting (Letiche, 2010; Shotter, 2008). In this sense, polyphony allows an authorial voice or truth to be overcome while acknowledging actors’ differences and relations with one another. Polyphony shows that multiple actors have agency in the social world and that they somehow have to enact their different circumstances (Letiche, 2010). Thus, through participatory dialogue, actors shape and are shaped by their social worlds. In this dialogue, language understood as speech in our embodied acts of voicing our words and feelings (Bakhtin, 1985) is what allows distributed sensemaking.

As paper 3 illustrates, equivalent meanings arise when actors can understand how they interrelate as a system that contributes to act towards something, namely creating responses to alleviate poverty in different contexts. Here, polyphony allows closure in the sense that a meaning is co-generated by actors but, importantly, also allows enough openness so that they can act in their own social worlds (Gergen and Gergen, 2010; Letiche, 2010). In this sense, the “frontiers of exclusion” create an equivalent meaning that goes beyond a shared understanding of poverty because it acknowledges singularity and plurality simultaneously. Different subject positions interact to co-generate meaning that is meaningful at the collective (the international federation *Fe y Alegria*) and

individual levels (national offices operation). Regarding wicked problems, where manifestations are often dynamic and meaning is contested (Dentoni et al., 2018; Dorado and Ventresca, 2013; Reinecke and Ansari, 2016), dialogical constructions of equivalent meanings allow actors to converge and have a sense of closure while diverging in terms of action relating to their own ongoing circumstances. Thus, one of Weick's (1995; et al., 2005, p. 418) main concerns about collective sensemaking, which is that "*the cost of reconciling these disparate views is high, so discrepancies and ambiguities in outlook persist*", may be partially addressed. I have to acknowledge that this understanding of dialogue and language represents a form of complex thinking that requires moving from logical to postmodern notions.

Second, in order to engage in collective action that privileges distributed sensemaking actors need to use artefacts that allow interpretative viability. Interestingly, in paper 3, I revealed that a type of artefact is the metaphor. Metaphors enable multiple actors to coordinate action without necessarily agreeing on which path to follow. The extant literature has pointed out how metaphors contribute to making the unfamiliar familiar (Oswick and Jones, 2006; Tsoukas, 1991) and has also explained how new meanings can be generated (Biscaro and Comacchio, 2017; Cornelissen, 2005) and how they can be used to guide actors towards a desired future (Gioia et al., 1994). In this research, I have shown that when multiple actors come together in dialogue without marginalising any voices, they can construct metaphors that are complex enough to allow multiple action based on varied interpretations.

Although metaphorical thinking alone does not provide novel elements to the literature of sensemaking, its polyphonic construction advances research on wicked problems. This is explained by the fact that a polyphonic construction of metaphors allows us to understand (i) how actors deal cognitively with the creation and interpretation of complex meanings and (ii) on the communicative side, it explains how diverse groups of meaning interact to create boundaries concerning what actors want to address or dismiss (Yanow, 2008). When actors have divergent interests, it is almost impossible to achieve an outcome that satisfies all (Cornelissen et al., 2011). Nonetheless, these metaphors allow different actors to participate in the construction of new meanings while carrying out their embodied acts of voicing our words and feelings (Bakhtin, 1985). Therefore, the

metaphor not only represents a new meaning but also the multiplicity of associated interests that can guide the action of specific actors in diverse situations. Overall, metaphors provide a common language for bonding and communicating inside the organisation while providing a broad scope for interpretation that enables multiple pathways.

### **6.3 Contributions to the literature on wicked problems**

Finally, this thesis offers a contribution to the literature on wicked problems by elucidating responses that address each dimension of the wicked problems. As Rittel and Weber (1973) argue a planner has no right to be wrong when responding to a wicked problem. Moreover, the planner has to find a way to decide which solutions are good enough for tackling the problem. In order to reduce these pressures, this thesis has identified seven responses that relate to the theoretical domains of collective action and distributed experimentation.

In the case of collective action; the findings of this thesis align with current literature that points the need to include the affected ones (Mische, 2014), and the need to find alternative ways of organising (Ferlie et al., 2011; Ferlie et al., 2013). Including the affected ones not only provide more information about the problem but offers the enacted experience of the affected. The last one is unique and not even by placing an all mighty-knowable actor can be replaced. As noted by Mische (2014) and Dorado and Ventresca (2013) complex problems responses need to include as many actors as possible even if the process is lengthy and effort consuming.

In addition, collective action must be open to more flexible ways of organising. In this sense, current literature has pointed the importance of forms that are not hierarchical nor market based (Ferlie et al., 2013). This study has found that a federative form of organising allows actors to work at the macro and micro level simultaneously acknowledging differences. It is important to note that wicked problems have different dimensions and that even the same problem can be read in diverse ways creating conflict among actors. As such, ways of organising need to account for difference without generating exclusion.

Finally, in terms of distributed experimentation it is true that a planner has no right to be wrong. However, this in practice is impossible as all actions or inactions create consequences (Weber and Khademian, 2008). In this regard, in order to avoid a fatalist view that leads to inertia (Ferraro et al., 2015) actors need to think outside the box and use constraints to create opportunities. By seeing the absence of resources as a powerful motivator, actors can avoid exhausting current ones while using their imagination. Overall, these responses address different dimensions of wicked problems and when they are deployed simultaneously the problem can be more manageable.

## **6.4 Contributions to practice**

In the previous sections, I highlighted the most significant theoretical contributions of this doctoral study as well as its implications for research. In this section, I translate them into practical advice for managers and organisational actors in general. These practical implications are suggestions and are not value neutral. In what follows, I explain two implications for practice. First, I explain the contributions to FyA. Second, I turn to the notion of unfinalized futures, and then I conclude with some reflections on the importance of metaphors that allow actors' convergence and divergence.

### *6.4.1 Organisational contributions for FyA*

The findings of the research conducted at FyA were included in one report of 30 pages and presented during a meeting of the Council of National Directors in Ilhéus (Brazil) in 2018. The research conducted provided two major inputs for the organisation. First, it highlights the importance of going back to the roots of FyA – in terms of organisational discretion and autonomy – but with the inclusion of some minimum levels of formalisation. In line with the experience of the founder, Father Velaz, each FyA needed to be autonomous in its operation; however, this changed dramatically when the strategic plans of the federation started to take place. Although autonomy was never discussed in these plans, a subtle narrative of standardisation in practices, responses, indicators, and readings of poverty arose. In relation to the problem that the organisation seeks to address (poverty), general standardisation creates more problems than it solves. Nonetheless, that does not mean that the organisation does not need a minimum form of formalisation in the processes that it undertakes. In this regard, the new strategic plan speaks explicitly

about the formation of networks to address contextual problems. Formalising some of the minimum grounds for the formation of these networks can improve the processes of emergence, development, and closure without compromising discretion and autonomy.

Second, in terms of organisational participation, I stressed that there is a major challenge to overcome regarding dialogue. In strategic terms, dialogical processes in the organisation are extremely lengthy and it may be that topics that were relevant a year ago are not significant anymore. Although I see dialogue and participation as two of the key features of FyA, excessive dialogue can also lead to inertia, as well as to failing to read current changes and future opportunities. This concern was evidenced in middle and lower levels of the organisation during informal talks and interviews. The proposal here is to identify which topics are more suitable for starting discussions at specific levels. For instance, topics such as initiatives have more relevance if they arise from the schools, then move to the national office, and escalate to the federation to create international networks. Along the same lines, topics such as the overarching principles should start in the national offices and move to the General Assembly, where representatives from each country have at least two seats.

#### *6.4.2 Contributions for organisations addressing wicked problems*

Organisations operating at the edge of wicked problems face several challenges in terms of creating meaningful responses. In this sense, the findings of this thesis provide two main practical contributions for this type of organisations. First, solutions for wicked problems will be always imperfect (Grint, 2010) but in conjunction with multiple imperfect solutions actors can improve expected results. In this context, imperfect solutions mean that organisational actors must understand that there is no best solution (Rittel and Weber, 1973) but that there are different solutions, which are contextually plausible complementing each other. For example, in the case of Fe y Alegria there are at least three imperfect solutions that in conjunction complement each other to tackle poverty. These responses are: offering formal education in deprived areas, using radios to reach the invisible and providing training in political advocacy for the marginalized. Independently, each response can generate some desirable results but when deployed simultaneously issues around hidden elements, unintended consequences and multiple symptoms can be greatly addressed. This practical contribution can be of greater use for

organisations dealing with climate change and human migration crises. In the case of climate change organisations such as Greenpeace, EarthJustice and 350.org could focus their responses on political action at the local and regional level pressuring regulatory change, while at the same strengthening links with communities and local enterprises. As such, issues around regulations, production and demand can be addressed as part of the same system. Similarly, in the case of human migration crises, organisations such as the Jesuit Refugee Service, the Global Migration Group and OXFAM need to understand that unitary-isolated responses would not produce the expected results in the medium and longer run and that the small victories achieved in the short term can be vanished. A good example is the current case of Italy and its new immigration policies.

The second practical contribution for organisations dealing with wicked problems is the need to open strategy to polyphonic constructions. In contrast with Grint (2010), who argues that strong leadership is the key to address wicked problems, the study of Fe y Alegria opens the door to strategic constructions that embrace multiple logics, voices and perspectives. In dealing with wicked problems is important to understand that problems are difficult to define, may be symptoms of other problems and that actors do not know if what they are doing is enough to offer a satisfactory response (Rittel and Weber,1973).

In this sense, a polyphonic construction of the responses offers a better understanding of the wicked problem due to the presentation of multiple views. In addition, a polyphonic construction increases the possibility to reduce unintended consequences of the responses as the problem is perceived as a system of interrelated variables. Finally, a polyphonic construction can also offer benefits in terms of deploying the responses as multiple actors can inform and change gradually their actions in accordance with other members. This contribution aligns with the work of Mische (2014), who studied how actors addressed climate change. In her study of the Rio + 20 debates, she found that a key starting point in the process was the inclusion of all possible actors starting off with the affected ones when deliberating responses. Similarly, Ferlie et al. (2013) in their study of the NHS in England found that networks are better forms of organising that hierarchical or market based as they may increase the capacity of organisations to understand, deal and respond to wicked problems. Thus, organisations dealing with wicked problems could be benefited of including more actors even if this process requires time and adaptation.

### 6.4.3 *Organising with unfinalized futures in MNEs*

Modern management ideology has lost the notion of the future as different from the present (Johansen and Cock, 2017). Management theories seek to make the future known. Linear projections begin in the past, which is conceived as a source from which to understand both the environment (Tripsas and Gavetti, 2000) and the organisation (Gioia and Thomas, 1996; Kaplan, 2008). In what is called late modernity (Giddens, 1999), social changes are liquid making actors constantly re-evaluate their expectations, yet most management thinking adheres to technologies that see time as a series of perpetual presents; there is no desire at all to rethink the future (Levitas, 2013). Generally, it appears that most managers neither need nor want to engage in post-Weickian sensemaking. However, to make progress, be innovative, and embrace extreme challenges, one needs to rethink (Levitas, 2013).

By reconquering the openness of the future, managers can appreciate indeterminacy and escape the mentality of “business as usual” (Johansen and Cock, 2017), which is core in capitalism. This probably explains why capitalism is so harmful when it engages with solutions for long-term futures (Žižek, 2015). In this sense, reconquering the true nature of the future is desirable not only to avoid hegemonic conditions but to create new states that depart from what is known (Levitas, 2013). Thus, the general advice to managers in NGOs and MNEs is to embrace the future as unfinalized. In these unfinalized futures in organisations, actors can embrace not only one but multiple futures. Such futures are ongoing constructions in terms of what “*will be happening*”, in which actors are “*continuously performing and recalibrating their futures*” (Emirbayer and Mische, 1998, p. 984; Tavory and Eliasoph, 2013, p. 936). Put simply, strategizing must open the door to more flexible and adaptive ways of dealing with the future in which future plans move from unitary conceptions to multiple and intertwined imaginaries of several organisational actors. Current exemplars of managers and organisations using unfinalized futures are Jeff Bezos with Amazon and Elon Musk with Tesla Motors, Space X and Hyperloop.

#### *6.4.4 Embracing complex metaphors in Multinational Enterprises (MNEs) and International Non-Governmental Organisations (NGOs)*

Perhaps the most significant aspect that was learnt from my research conducted at Fe y Alegria is how it managed to have an organisational structure and a strategy that responds to collective and individual demands simultaneously. This process was made possible using complex metaphors. Here, metaphors allowed different organisational actors to converge in meanings that provided purpose (alleviating poverty) while allowing them to bond. In addition, these complex metaphors allowed the divergence to respond contextually (poverty is not the same for all). Translated to MNEs, this means that metaphors can provide an overarching meaning about the purpose of the organisation while giving it enough room to operate differently in multiple contexts. Put simply, metaphors allow the management of issues around the global and local disparities of this type of organisation. In addition, these complex metaphors are extremely useful in NGOs that address wicked problems/grand challenges such as human migration, global hunger, poverty, and climate change. One of the biggest problems of this type of organisation is remaining open enough to find alternative solutions. In this sense, complex metaphors provide reasons for acting but allow actors to respond to the problem differently in each context. Wicked problems are, in the end, social problems, and the organisation's responses to them should be contextually driven and not externally imposed.

*Corollary:* When dealing with the future, organisational actors need to create possibilities for new futures; this means creating spaces for imagination in the organisation. These spaces should embrace a multiplicity of imaginaries without trying to impose or control the future. In organisations, there will be always a battle for control and power, but through richer interactions with multiple actors, constructions that are more meaningful can be reached.

### **6.5 Limitations and future research**

There are some inherent limitations to this doctoral study. First, the fact that the whole study was conducted using a single case study based on a religious NGO with particular personnel (Jesuits) and a particular structure may raise an issue about the generalisability of the findings. Fe y Alegria, in contrast with other MNEs or NGOs, is an organisation in

which religious members (Jesuits) have a different understanding of the purpose of the organisation (i.e. opposite to the shareholder view) and how to engage in organisational processes (i.e. participatory and multi-authored). These organisational processes usually follow lengthy dialogical constructions that many companies usually do not experience. Moreover, Jesuit thinking is well-known for its metaphorical underpinning. Thus, it could be argued that issues around the dynamics of meaning construction and metaphorical processes may be more salient than in other organisations. Second, this study is subject to limitations that include respondents' and the researcher's intersubjective constructions of reality. I have tried to be as transparent as I can with the data in order to reduce it. However, in qualitative research, and specifically in studies that involve long periods of interaction with respondents, meaning becomes subject to intersubjective modification. Third, as in all studies about the future, there are limitations based on the cognitive and discursive abilities of respondents to imagine and express ideas and thoughts about the future.

In terms of future research, I believe that there are at least three promising avenues. First, I have identified some linguistic/cognitive objects, namely metaphors that allow actors to construct equivalent meanings that motivate them to take action. In relation to the material turn, it would be worth exploring how material objects mediate or/and facilitate the construction of equivalent meanings. Current research (Comi and Whyte, 2017; Stigliani and Ravasi, 2012) has pointed to the material practices that support the transition from individual to collective sensemaking in teams whose members have with similar backgrounds or identities. However, less attention has been paid to coordinated action that requires addressing spatial and temporal distances between organisational members, such as between different departments within an organisation or between subsidiaries and holding companies. Delving into these processes would provide a more comprehensive understanding of meaning making and enactment involving materiality, language, and cognitive processes in the sensemaking literature.

Second, there is also a promising avenue for future studies in terms of sensemaking and temporality on at least two different flanks. On the one hand, while there are different types of narratives explaining how organisational actors deal with temporality to make sense of what is not yet there, future studies could go beyond this to explain the processes

through which diverse organisational actors develop sensemaking frameworks that allow them to transit from multiple temporal dimensions and horizons. This would provide a more nuanced theorisation of time and temporality in the sensemaking literature, which is currently dominated by fixed temporalities and linear conceptions of time. On the other hand, research in prospective sensemaking could delve into topics relating to some of the dimensions of the future, such as reach (the extension of the imagined future), expandability (the degree to which possibilities are perceived as increasing or reducing) (Mische, 2009), and temporal ones such as depth and horizons (Bluedorn, 2002). Overall, both avenues of research would enrich our comprehension about time in sensemaking as a multiple construct rather than a single concept.

## **6.6 Epilogue**

Although I have almost finished writing this thesis, I cannot stop wondering about how to escape from two major questions that I identified during my research. The first one relates to the subtle and dominant narrative of development that has been imposed on developing countries. During the whole period of research, I could appreciate that our visions (Latin America) of the future and development are largely dominated by north-centric approaches that have more contextual differences than similarities. This notion is more salient in the production of knowledge, which greatly relies on the reproduction of theories and frameworks that function in economies and societies with certain characteristics but contribute little to the solution of developing countries' problems. In this regard, my views are aligned with those of Žižek (2015) in the sense that most of what we know only reproduces hegemonic discourses that keep the power and economic wealth in the north at the expense of the rest of the world. The second question relates to the potential contributions of organisational studies to addressing major societal problems that are lost in the current system of publishing. While we as researchers continue publishing in journals that are out of people's (i.e. the public and universities in developing countries) reach because of their price and controlled access, I feel that most research and its contributions fail in their social mission. In this sense, I agree with Alexandra Elbakyan (founder of Sci-Hub) and believe that knowledge produced in universities or funded with public money must be published in open-access journals.

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## Appendix 1. Questionnaire

1. What is your name?
2. How did you come to Fe y Alegria?
3. Can you tell me about your role in Fe y Alegria?
4. Can you tell me how is a normal day at work?
5. How do you understand poverty? – How do you think faith and joy contribute to improving the environments in which it operates?
6. What are your personal goals in Fe y Alegria? - How do you work towards achieving those objectives?
7. How do you relate with other members of Fe y Alegria? - How is the relationship between nodes? and with the International Federation?
8. How is the process of creation of projects or programs?
9. How is the process of implementation of projects or programs? - Are there alternative plans to achieve the goals or objectives?
10. What happens when the project does not achieve the expected results?
11. How do you think/imagine the future of the places where Fe y Alegria operate? / The future of Fe y Alegria?
12. How are the programs socialised (on the site, in the network)?
13. When differences with other members arise how are they solved?
14. How integrated are the plans, programs or projects (International Federation) to the national node?
15. Do you think you want to tell me something I did not ask you about? - Do you have any questions for me?

## Appendix 2. List of Interviews

N	Position	Node and Place of the interview	Interviewer	Date of the interview
1	Project Technician	International Federation - Bogota	Camilo Arciniegas	2016
2	Project Technician - Systems	International Federation - Bogota	Camilo Arciniegas	2016
3	Project Technician	International Federation - Bogota	Camilo Arciniegas	2016
4	Secretary	International Federation - Bogota	Camilo Arciniegas	2016
5	Project Technician - Communication	International Federation - Bogota	Camilo Arciniegas	2016
6	Project Technician - Fe y Alegria USA	International Federation - Bogota	Camilo Arciniegas	2016
7	International Coordinator	International Federation - Bogota	Camilo Arciniegas	2016
8	Radio Coordinator	Radios Fe y Alegria - Venezuela	Camilo Arciniegas	2017
9	National Director	Fe y Alegria - Ecuador	Camilo Arciniegas	2016
10	National Director	Fe y Alegria - Honduras	Camilo Arciniegas	2016
11	Ex National Director	Fe y Alegria - Bolivia	Camilo Arciniegas	2016
12	Project Manager - Formal Education	Fe y Alegria - Spain	Camilo Arciniegas	2018
13	Finance Director	Fe y Alegria - Spain	Camilo Arciniegas	2018
14	Human Resource Manager	Fe y Alegria - Spain	Camilo Arciniegas	2018
15	Project Manager - Formal Education	International Federation - Spain	Camilo Arciniegas	2018

16	Project Manager - Evaluation and Quality	Fe y Alegria - Spain	Camilo Arciniegas	2018
17	International Cooperation Director	Fe y Alegria - Spain	Camilo Arciniegas	2018
18	National Director	Fe y Alegria - Spain	Camilo Arciniegas	2018
19	Project Manager - Evaluation	Fe y Alegria - Spain	Camilo Arciniegas	2018
20	Project Manager - Impact	Fe y Alegria - Spain	Camilo Arciniegas	2018
21	Project Manager - Humanitarian Action	Fe y Alegria - Spain	Camilo Arciniegas	2018
22	Executive Director	Fe y Alegria - Spain	Camilo Arciniegas	2018
23	Project Technician - Education	Fe y Alegria - Spain	Camilo Arciniegas	2018
24	Project Manager - Migration	Fe y Alegria - Spain	Camilo Arciniegas	2018
25	Project Technician - International Cooperation	Fe y Alegria - Spain	Camilo Arciniegas	2018
26	Communication and Corporate Relations Director	Fe y Alegria - Spain	Camilo Arciniegas	2018
27	Project Manager - Citizenship	Fe y Alegria - Spain	Camilo Arciniegas	2018
28	Project Technician - Systems	Fe y Alegria - Spain	Camilo Arciniegas	2018
29	Marketing Coordinator	Fe y Alegria - Spain	Camilo Arciniegas	2018
30	Project Manager - Fe y Alegria USA	International Federation - Spain	Camilo Arciniegas	2018

31	Project Technician - Fe y Alegria USA	International Federation - Bogota	Camilo Arciniegas	2018
32	International Coordinator - Public Advocacy	International Federation - Spain	Camilo Arciniegas	2018
33	Project Manager - People and Equipment	Fe y Alegria - Spain	Camilo Arciniegas	2018
34	Corporate Social Responsibility Coordinator	Fe y Alegria - Spain	Camilo Arciniegas	2018
35	International Cooperation Africa - Manager	Fe y Alegria - Spain	Camilo Arciniegas	2018
36	Regional Coordinator	Fe y Alegria - Spain	Camilo Arciniegas	2018
37	Project Manager - Formal Education	Fe y Alegria - Spain	Camilo Arciniegas	2018
38	Coordinator - Public Action	International Federation - Spain	Camilo Arciniegas	2018
39	Project Technician - Education	Fe y Alegria - Spain	Camilo Arciniegas	2018
40	Regional Coordinator	Fe y Alegria - Spain	Camilo Arciniegas	2018
41	National Director	Fe y Alegria - Colombia	Camilo Arciniegas	2018
42	Regional Coordinator	Fe y Alegria - Colombia	Camilo Arciniegas	2018
43	Project Technician - Formal Education	Fe y Alegria - Colombia	Camilo Arciniegas	2018
44	Project Technician - Communication	Fe y Alegria - Colombia	Camilo Arciniegas	2018
45	Service Coordinator	Fe y Alegria - Colombia	Camilo Arciniegas	2018

46	Service Coordinator	Fe y Alegria – Colombia	Camilo Arciniegas	2018
47	Service Coordinator	Fe y Alegria – Colombia	Camilo Arciniegas	2018
48	Regional Coordinator	Fe y Alegria – Colombia	Camilo Arciniegas	2018
49	Finance Director	Fe y Alegria – Colombia	Camilo Arciniegas	2018
50	Formal Education Coordinator	Fe y Alegria – Colombia	Camilo Arciniegas	2018
51	Director Assistant	Fe y Alegria – Colombia	Camilo Arciniegas	2018
52	School Principal	Fe y Alegria – Colombia	Camilo Arciniegas	2018
53	Project Manager - Values and Citizenship Education	Fe y Alegria – Honduras	Camilo Arciniegas	2018
54	Ex-secretary	International Federation	Second researcher	2016
55	National Coordinator Regular Education	Fe y Alegria - Bolivia	Second researcher	2017
56	Project Manager	Fe y Alegria - Bolivia	Second researcher	2017
57	Project Manager	Fe y Alegria - Bolivia	Second researcher	2017
58	National Coordinator Formal Education	Fe y Alegria - Bolivia	Second researcher	2017
59	National Director	Fe y Alegria - Bolivia	Second researcher	2017
60	Project Technician - Secondary Education	Fe y Alegria - Bolivia	Second researcher	2017
61	Project Technician - Formal Education	Fe y Alegria - Bolivia	Second researcher	2017
62	Project Technician - Religious Education	Fe y Alegria - Bolivia	Second researcher	2017

63	National Coordinator - Boarding Schools	Fe y Alegria - Bolivia	Second researcher	2017
64	Project Technician - Boarding Schools	Fe y Alegria - Bolivia	Second researcher	2017
65	Project Technician - Special Education	Fe y Alegria - Bolivia	Second researcher	2017
66	Project Technician	Fe y Alegria - Bolivia	Second researcher	2017
67	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
68	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
69	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
70	Project Technician	Fe y Alegria - Bolivia	Second researcher	2017
71	Project Technician	Fe y Alegria - Bolivia	Second researcher	2017
72	Project Technician - Religious Education	Fe y Alegria - Bolivia	Second researcher	2017
73	Project Technician - Formal Education	Fe y Alegria - Bolivia	Second researcher	2017
74	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
75	Regional Coordinator	Fe y Alegria - Bolivia	Second researcher	2017
76	Project Technician - Formal Education	Fe y Alegria - Bolivia	Second researcher	2017
77	Regional Coordinator	Fe y Alegria - Bolivia	Second researcher	2017
78	Project Technician - Formal Education	Fe y Alegria - Bolivia	Second researcher	2017
79	School Principal	Fe y Alegria - Bolivia	Second researcher	2017

80	Regional Coordinator	Fe y Alegria - Bolivia	Second researcher	2017
81	Project Manager	Fe y Alegria - Bolivia	Second researcher	2017
82	Project Technician - Formal Education	Fe y Alegria - Bolivia	Second researcher	2017
83	Project Technician - Formal Education	Fe y Alegria - Bolivia	Second researcher	2017
84	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
85	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
86	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
87	Project Technician - Special Education	Fe y Alegria - Bolivia	Second researcher	2017
88	Project Technician - Religious Education	Fe y Alegria - Bolivia	Second researcher	2017
89	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
90	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
91	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
92	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
93	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
94	School Principal	Fe y Alegria - Bolivia	Second researcher	2017
95	National Director	Fe y Alegria - Paraguay	Second researcher	2017
96	Regional Coordinator	Fe y Alegria - Paraguay	Second researcher	2017
97	School Principal	Fe y Alegria - Paraguay	Second researcher	2017
98	School Principal	Fe y Alegria - Paraguay	Second researcher	2017
99	School Principal	Fe y Alegria - Paraguay	Second researcher	2017

100	School Principal	Fe y Alegria – Paraguay	Second researcher	2017
101	Regional Coordinator	Fe y Alegria – Paraguay	Second researcher	2017
102	Project Manager	Fe y Alegria – Paraguay	Second researcher	2017
103	Radio Coordinator	Fe y Alegria – Paraguay	Second researcher	2017
104	Project Technician - Radios	Fe y Alegria – Paraguay	Second researcher	2017
105	Project Technician - Radios	Fe y Alegria – Paraguay	Second researcher	2017
106	Project Technician - Religious Education	Fe y Alegria – Paraguay	Second researcher	2017
107	Project Technician - Radios	Fe y Alegria – Paraguay	Second researcher	2017
108	Project Technician - Education	Fe y Alegria – Paraguay	Second researcher	2017
109	Regional Coordinator	Fe y Alegria - Bolivia	Second researcher	2018
110	Project Manager - Religious Education	Fe y Alegria - Bolivia	Second researcher	2018
111	Project Manager - Planification and Control	Fe y Alegria - Bolivia	Second researcher	2018
112	Project Manager - Special Education	Fe y Alegria - Bolivia	Second researcher	2018
113	Project Manager - Technical Education	Fe y Alegria - Bolivia	Second researcher	2018
114	Project Technician - Formal Education	Fe y Alegria - Ecuador	Second researcher	2018
115	Regional Coordinator	Fe y Alegria - Ecuador	Second researcher	2018

116	Regional Coordinator	Fe y Alegria - Ecuador	Second researcher	2018
117	Regional Coordinator	Fe y Alegria - Ecuador	Second researcher	2018
118	Project Manager - Public Action	Fe y Alegria - Ecuador	Second researcher	2018
119	Project Manager - Formal Education	Fe y Alegria - Ecuador	Second researcher	2018
120	Project Manager - Federative work	International Federation	Second researcher	2018
121	Project Manager - Special Education	Fe y Alegria - Ecuador	Second researcher	2018
122	Regional Coordinator	Fe y Alegria - Ecuador	Second researcher	2018
123	Local Coordinator	Fe y Alegria - Ecuador	Second researcher	2018
124	School Principal	Fe y Alegria - Ecuador	Second researcher	2018
125	Local Coordinator	Fe y Alegria - Ecuador	Second researcher	2018
126	Project Technician - Religious Education	Fe y Alegria - Ecuador	Second researcher	2018
127	School Principal	Fe y Alegria - Ecuador	Second researcher	2018
128	School Principal	Fe y Alegria - Ecuador	Second researcher	2018
129	School Principal	Fe y Alegria - Ecuador	Second researcher	2018
130	Project Technician - Formal Education	Fe y Alegria - Ecuador	Second researcher	2018

### Appendix 3. Illustrative quotes chapter 4

<b>Narrative form: Screenplay</b>	Interviewee (32): What we do in the technical commission is a draft of the things that we can achieve, execute and the components to achieve the results in these years.
	Interviewee (17): We have measures for each project, we like to measure things
	Interviewee (43): After several years of work we have identified a model...we have clearly identified the components, interactions in terms of offer and management
<b>Narrative orientation: Linear</b>	Interviewee (2): We make diagnoses depending on the needs... then we formulate the project and then we ask who wants to participate.
	Interviewee (86): We have several meetings with our team; we decide what we want to prioritize based on the possible funding. We make decisions and we start planning
	Interviewee (43): First we manage programs of three years...we start making proposals, delineate you can call that an approximation...we plan and then let's say once the program is established, we start reviewing to see if we are getting where we should
	Interviewee (38): There us a strong continuity Fe y Alegria for its nature of having educational proposal needs continuity.
<b>Future Openness: Future as planned</b>	Interviewee (38): Depending on the impact we want to have we visualize the frame of time, for instance gender is for two years as it is only a topic of training.
	Interviewee (2): Generally, we have good results; we know our numbers, how many people have been trained.
	Interviewee (79): We have clear goals...each year we review, and we implement campaigns to make sure we achieve the goals...in our meetings everything is about planning
	Interviewee (101): Experience makes specialists as I was mentioning you, we know what we expect to have.

<p><b>Narrative form: Nonlinear (Disjointed stories focused on experiences without chronological order)</b></p>	<p>Interviewee (15): I work at least in three different flanks I am responsible to manage the international volunteering program, selection processes and formative strategies for our colleague. I do not have normal days as I can have a meeting the whole morning or look to recruit for a vacancy or see that something happened with one of our volunteers or controlling problems inside the organization so this morning...</p>
	<p>Interviewee (94): I am in the international part of the organization, so I have lots of things to attend in these terms. I have to give support to our partners in the field, to our colleagues that design projects. I have also interactions with the federation of Fe y Alegria as I used to manage the expansion to Africa you know I am in several dimensions. I work several hours during the day but most of the time I am doing several things at the same time.</p>
	<p>Interviewee (66): I am the director of this Fe y Alegria I have the duty of dealing with the internal functioning and with the external relations of my office, I am now a member of the executive board of the federation ...my days are a bit chaotic as I have many things happening simultaneously...</p>
	<p>Interviewee (24): So, there are not two equal days... I usually work on global incidence, although if I am travelling, I am normally in workshops, meetings with coordinators in the areas of citizenship and international cooperation.</p>
<p><b>Narrative orientation: Non-linear (A series of evolving networks that focus on future relevance)</b></p>	<p>Interviewee (53): Look we have decided to build a platform because we live in a country full of violence and death where the principal victims are the youngsters so we want different angles, integral angles from different actors as the schools, parents, the kids and teachers to deal with topics that we consider extremely relevant...we mainly want a program that evolves based on exchanging discussions</p>
	<p>Interviewee (94): We conceived ourselves based on the asphalt however the context has changed in some place, we have changed we need to include these changes, more actors to find new solutions where are we relevant, where have we accomplished our goals we have to think radically different to what we have done, it is not saying that everything in the past is no longer useful is to think that probably not all the past is really useful for our future</p>
	<p>Interviewee (31): We have different stakeholders to satisfy in Fe y Alegria the only way to do it is thinking about their needs and project them as interconnected concerns that can meet in the future...For this communication is extremely important trying to know what they want and expect is part of my job</p>
<p><b>Future Openness: Future as flexible</b></p>	<p>Interviewee (66): In many things we have to change our chip, we need to sensitize people with these dynamics...our processes can't continue based on the idea that because it worked in the past, in our contexts we can't continue with this mind-set</p>
	<p>Interviewee (11): Our plans are for 5 years however our projections are beyond those 5 years because our Fe y Alegria has 53 years of operation...we have an economic recession we can't fall; we have to be sustainable and creative</p>
	<p>Interviewee (9): It is true that as an education movement we are always searching...we have never been closed to innovation and change</p>

<b>Narrative form: Quest</b>	<p>Interviewee (23): The sector of basic education, the sector of higher education, the sector of the poor with FyA, the social sector, I think we have fragmented at the organizational level our responsibility, Jesuits documents speak about social justice as the topic of the Society but one thing is that it is written and another is how we work it.</p>
	<p>Interviewee (25): We are thinking in Africa, how they construct the narrative of popular education that is a process with many problems...we have not reached agreements with the governments.</p>
<b>Narrative orientation: Cyclical</b>	<p>Interviewee (98): The experiences of Chad, Madagascar and RD Congo have generated the opportunity of working again with the poorest people...in accordance with the mission of the Society of Jesus.</p>
	<p>Interviewee (23): The education of FyA has the methodology of seeing the person as a set of potentialities that need a good orientation, this is totally Ignatian, Ordering potentialities based on the plan of God.</p>
<b>Future Openness: Future as a question</b>	<p>Interviewee (98): The point I want to arrive is that FyA has an enormous question ahead and it is how we do not lose relevance, there are many countries where we are strong but the context is changing and what are we going to do?</p>
	<p>Interviewee (23): We have a tension nowadays in the Society of Jesus, many Jesuits think that we should provide education for the elites in traditional schools and other think that we need to continue the work of FyA with the poor.</p>
	<p>Interviewee (25): The objective is to provide education to the poor, taking them out of poverty based on how we orient them... The debate now is "it is enough to conceive FyA education for the poor" as a concept only related to the economy?</p>

## Appendix 4. Illustrative quotes chapter 5

	Before strategic change (Pre-2015)	Quotes - Interviews and Observations	During and After strategic Change (Post-2015)	Quotes - Interviews and Observations
<b>Role of the federation</b>	<i>Manager of programs</i>	<p>Interviewee (2): The office has a format that is proposed for unified management to work as a collegiate team of coordinators.</p> <p>Interviewee (35): They felt that the programs were taking more strength than their proposal in the country. So it began to produce some symptoms like detachment with the federations and it seemed that the federation that came up and said "to you like you have the technical education line I remind you that there has to be a link and that you have to do these four lines of technique in your country "that produced tension.</p>	<i>Facilitator and moderator of interactions</i>	<p>Interviewee (10): It starts in the countries and ends in the countries, so the federation has the responsibility to encourage and support the countries everything that happens, everything that can be said to arise as networks from the countries.</p> <p>Interviewee (38): The federation now should be a link between countries not a supra-entity. The federative team should animate not coordinate.</p>
<b>Resources - Interactions between national nodes</b>	<i>National, limited exchange of capacities</i>	<p>Interviewee (18): The federation provided all and then countries joined, this caused that interactions were always problematic and that each country worked alone in the project.</p> <p>Interviewee (38): The dynamic in the federation was always dominated by the "federation", countries only aligned to programs, in many cases for</p>	<i>Networking, identification of strengths and capacities for sharing</i>	<p>Interviewee (42): My country has established somehow a gateway to international financing, mainly Spanish corporations, we can share our experiences for other countries so they can find resources for more projects.</p> <p>Interviewee (35): cooperation is also changing a lot; I think it's happening from a cooperation in which money was very important at a time when know-how is going to have more importance</p>

		money convenience but not for a real strategic need.		
<b>Strategy</b>	<i>Responsive, Inflexible , Dominated by donors</i>	<p>Interviewee (25): the financing is negotiated with donors. First, we manage three-year programs, so that we say that every three years there is a moment of greater creativity and greater negotiation that is long. It can last almost a year, that is, almost a year before you start, to start a program you have to start making proposals, to negotiate, to delineate.</p> <p>Interviewee (2): Is the case of Peru, those countries with a long tradition have been nationalized so much; that have been left with many difficulties in being movement and at this moment the change they cannot move.</p> <p>Interviewee (54): I am not going to lie to you, donors are crucial in our planning, we respond to donors. I think this is a problem because we cannot move beyond what is established with them.</p>	<i>Pro-active, Dynamic, Constructed with the communities</i>	<p>Interviewee (21): we begin to understand that our most valuable role can be just to be able to read the reality of FyA and articulate it in multi-country and multi-annual programs ... respecting local dynamics.</p> <p>Interviewee (9): What I do want is to work more on the basis of networks in which the adscription to the networks is much more open. Networks have a component that constituted me with a very specific objective and then we will see if this network continues but it is not does have to be a permanent line of work.</p>
<b>Temporality</b>	<i>One for all participants</i>	<p>Interviewee (48): with the previous plans, all the processes are clearly established. We include products, deadlines and they are pretty standard so all can do it.</p> <p>Interviewee (35): The planning in the Federation fits everyone into</p>	<i>Diverse and based on commonalities</i>	<p>Interviewee (8): The idea if well approach is that the networks start in the countries and then we move to find funding.</p> <p>Interviewee (49): I visualise the work based on commonalities rather than those massive projects that we executed before. I can see</p>

		<p>the same at the end of the day. Our deadlines are the same even we you can compare us with others. This is problematic as we are young and with less resources but have to run at the same pace that the big and old FyAs.</p> <p>Interviewee (66): I have a concern with projects at the end of the day. For example, when the donor gives us the money, all the FyAs involved have to deliver at the same time.</p>		<p>that some FyA have similar issues so they can have small networks and work collaboratively.</p> <p>Interviewee (77): Let us pray that what we envision works. If we work based on small structures, we can account for difference something that we lost long ago.</p>
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