

ON SHARING EXPERTISE¹

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April 15, 2014

My topic today is how best to share our knowledge and expertise with others. In different ways, this is part of what we do as teachers, scholars, coaches, and advisers. And, I think, as Christians.

I will talk about working on difficult problems in poor countries and then try to generalize. With your help I'd like to explore a tension about expertise.

On the one hand, it is needed. Consider this call for more knowledge about what works in international development:

For decades, development agencies have disbursed billions of dollars for programs aimed at improving living conditions and reducing poverty; developing countries themselves have spent hundreds of billions more. Yet the shocking fact is that we have relatively little knowledge about the net impact of most of these programs... But if evidence about what works were systematically developed and made public, that information could be used for better public policymaking and thus for more effective international aid and domestic spending (Savedoff and Levine, 2006: 1).

Let me hold up a book that epitomizes what these authors have in mind: John Hattie's *Visible Learning: A Synthesis of Over 800 Meta-Analyses Relating to Achievement* (2009). Hattie, a professor in New Zealand, spent 15 years culling research around the world about millions of students, creating "the largest ever collection of evidence-based research into what actually works in schools to improve learning."

It is said that the world needs expertise like this. And yet, let me hold up a second book, this one brand new: William Easterly's *The Tyranny of Experts* (2014). On the back flap comes this message: "The disrespect shown to poor people by agencies such as the World Bank and the Gates Foundation, with their stereotypes of wise technocrats from the West and the helpless victims from the Rest, has to end."

The tension is ancient and universal: we want the fruits of expertise, but we mistrust the arrogance and tin ears of experts.

My own work faces this tension. I am privileged to work with countries around the world on some of their most difficult problems. This work combines high importance and high contextual variability. The stakes are as large as who survives, who thrives. How, then, to manage the sharing of knowledge and experience people in these countries are eager to access, without the tyranny of experts we are all eager to avoid?

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I'd like to share some ideas with you, and then discuss with how they might apply to what you do in your teaching, advising, and Christian witness.

A PERUVIAN CHALLENGE: WHAT WORKS HERE?

Let me take you back to a formative lesson for me.

It was the summer after my first year of graduate school. I was fresh from heavy lifting in courses on economics, statistics, mathematical modeling, and decision theory. I was working for three months in Peru's Institute of National Planning. The revolutionary government wanted to evaluate the foreign aid it received. Over 200 aid projects were underway. They ranged from rural roads to immunization to environmental protection to the development of the fishing industry. One project enumerated the monkey population in the Amazon.

The Minister of Planning explained to me what he sought. "We want to tell the donors what we want and need, not just take what they are giving. Last week, someone from UNIDO was here and said, 'Would you like this project? We have funding for it. But if you don't, we'll take it to Ecuador.' We need evidence to be able to say, 'This kind of project works well, this kind doesn't—and given our national plan, here's what we'd like you donors to do.'"

Sure, I said in effect to the Minister of Planning. Can do.

Brimming with the confidence of a graduate student, I imagined answering the Minister's question with a study. We would assemble the social benefit-cost analyses of all the development projects. Then we would create a multivariate model with the benefit-cost ratios on the left-hand side and, on the right-hand side, variables about sector, donor, project design, budget, degree of popular participation, and who knows what—something like this equation:

$$\text{Social } b/c = f(\text{project characteristics, sector characteristics, budget, ...})$$

We'd estimate the model statistically, and the results would tell us what kinds of projects worked best, other things equal.

Our office in the Institute of National Planning had only three professionals and few funds, but we got to work. We pulled the files on each project. There were "evaluations," but only in terms of this happened then or this money went there. We found almost no data on social benefits and costs.

Distraught, I sought in the new national plan the social welfare function of Peru. To my surprise, nothing there corresponded to the mathematical constructs of my economics courses. I met again with the Minister of Planning and asked him about Peru's social welfare function. He responded, "Social welfare *what?*"

After a couple of weeks, I realized my dream equation was more like a nightmare. And so I wrote to one of my professors, the great statistician Frederick Mosteller. I described the evaluation task and its impossibility, and I implicitly laid that impossibility on the models of policy analysis and evaluation he and the other professors had been propagating.

Professor Mosteller wrote back. He said in effect: "People can never agree on what benefits and costs are in the abstract. But they can and do agree on specific examples of outrageous

success and outrageous failure. Find these among your projects. Study them. Compare them. Share your results, and learn some more.”

We followed his advice. My Peruvian colleagues and I went from ministry to ministry, asking for outstanding examples of aid projects. (We decided to forgo the failures.) Eventually, we studied six of the successes. At the same time, we put together data on all the projects—how much money was being spent each year in which ministries and from which donors. And we reviewed academic hypotheses about why some sorts of foreign aid projects work better than others.

At the end of the summer, the Minister of Planning called a meeting. He invited the ministers and the donors. He asked me to facilitate. We brought a stack of printouts with all the data on all the projects, and we presented a summary. We had shared in advance brief descriptions of the six successful projects, which we now quickly reviewed. Then I asked the participants, “Why do you think these projects succeeded?”

One of the ministers said local participation was key. But another minister cited a project that had failed despite participation. One of the donors cited his experience in other countries with participation of various kinds.

Soon we had a full-blown discussion of what works where and why. Peruvian wisdom and experience were evoked, and so was international knowledge. Every once in a while, I would ask a question based on the development literature. By the end of the session, ideas had been shared, and there was movement toward priorities for the projects Peru needed next.

Frederick Mosteller’s advice worked, in several senses. The donors were impressed and cut the Peruvians more slack in deciding what projects would be funded and how the projects would be structured. Ministers worked better together and with donors. The head of my office got promoted and then was plucked away by the United Nations Development Programme, which two years later asked him (and me, as a consultant) to replicate this “evaluation” of foreign aid in two Central American countries.

But my dream study never happened. I did not provide anything like an equation to say what worked where in Peru. Instead, a combination of data about all the projects plus examples of success plus a room full of expertise led to creative thinking about what works where. The participants ended up with better knowledge, better relationships, and the beginning of collaborative problem solving.

My idea of policy analysis and evaluation was altered forever. Yes, I still admired and appreciated welfare economics, but I realized that no country actually possessed a social welfare function (and perhaps none ever would). I enjoyed and used statistics and econometrics, but as I have learned since, that perfect equation is an illusion. The stylized models I love are almost impossible to evaluate in a world of where local differences are huge and contexts are changing.

A *convening* can help. That’s what happened when the ministers considered together data about foreign aid in Peru and six short case studies of projects that seemed to be working. The hoped-for results of a convening are better inferences about what will work here *and* the kindling of creative problem solving that go beyond what any outsider could provide.

SHARING EXPERTISE IN INTERNATIONAL DEVELOPMENT

My field is international development, in particular the situation of the poorest countries of the world. They are often ill-formed nations, residues of colonial worlds where they were washed over with constitutions and freedoms and educations that only patchily took hold. These countries are prime locations for a kind of epistemological schizophrenia, with local “realities” pitted against “human rights” and economic “principles.”

Much academic work is characterized by universalism. Economists strive for models of development that might be applied to all countries, to Chad as well as Chile, to China as well as the Czech Republic. Economists are not alone, however. One can find similar universalist aspirations in studies of social development, of gender and of race, of poor farmers and of entitled élites.

In this field I have focused on the underworld of underdevelopment. With all the paeans to the market, why do newly “liberated” markets so often disadvantage the poor, and what might be done to make markets work better and fairer? How can corruption be reduced, if never eliminated? What can be done about self-reproducing, self-protecting élites? What can be done to reduce racial and ethnic inequalities?

It has been my privilege to work on these issues with people all over the world. My task has been not just to write books but to help people share their own and other people’s knowledge, to share whatever quasi-scientific insights I and others might provide, in ways that stimulate local people to think and act more creatively and constructively.

The sharing takes several forms. First comes a telling example of progress. Let’s look together at an example in another country where this problem has been tackled more or less successfully. Next comes sharing a model or framework or theory that helps people think about the problem differently. In both the framework and the example, *how* things are shared can make all the difference. For example, in my books I have tried to combine both models and case studies, and to adopt a practitioner’s perspective. In consulting, I try to share knowledge through “convenings.” For example, I design and facilitate events in which participants work through case studies from other countries, in a problem-solving mode, before addressing their own situations. And when they finally do look at their own problems, I help them this way: “Let us look again at the framework or model. Let us apply the same analytical and practical spirit of analyzing various alternatives that we used in the case study of the other countries.”

Thus prepared and engaged, locals often come up with new approaches and practical ideas that neither they nor I would have anticipated.

This approach to sharing seems to me useful for problems that have these attributes:

- An opportunity for people who ordinarily do not talk or work well together to consider a new way of tackling an issue through examples from unfamiliar environments and analytical frameworks.
- A chance to learn from solutions elsewhere, even though conditions and circumstances vary.
- A problem whose solution, or even whose identification, seems to require creativity and energy, not just an understanding of well-known theorems or recipes.

- And at the risk of misunderstanding, a situation that allows the possibility for a humble sort of conversion experience, in the sense that some people may come to see an issue in an entirely different light—as a starting point, as something they can do something about, instead of just accepting current results as fate.

When a problem has these characteristics, I surmise that we should go beyond academic presentations of theory and scientific descriptions of regularities. I say this as one who enjoys and profits from both theory and data. But we need more: we need a process that engages the heroic instincts and invites a calling, an insight, and new ideas for serving. And, perhaps, we have to facilitate this process with something like love.

Let me share a more recent story with you, which shows how the technique can pay off.

A SECOND EXAMPLE

In June 2010, Benigno Aquino III was elected president of the Philippines. His campaign slogan was *Kung walang korap, walang mahirap*—“When there is no corruption, there will be no poverty.” His inaugural address focused on fighting corruption. But quickly the discussion turned to, “Now what do we do? What should our strategy be? Where to start?”

Five weeks after Aquino took office, an all-day cabinet meeting was convened in Malacañang Palace on a Saturday. The participants were Philippines cabinet secretaries, plus the heads of the Central Bank, the Customs Bureau, and the Bureau of Internal Revenue. They studied data about the extent and social costs of various kinds of corruption in the Philippines and elsewhere. In the style of a two-part business school case, they analyzed a country that had successfully reduced corruption. They worked through a framework for policy analysis.

The problems of corruption are complex; the “ecology” of the Philippines is unique. And yet, the data, the case study, and the theoretically informed framework became, with these participants in this process, a catalyst for creative problem-solving.

By the evening, they devised an outline of a national strategy, which they refined on Monday and briefed to the President on Tuesday. A plan of action followed—actions that so far have been successful in raising investment, improving public services, enhancing public trust, and increasing the popularity of the president.

In many other cities, ministries, and countries, I have seen such convenings make dramatic differences in the way leaders look at policy issues, in the alternatives they consider, in the partnerships they pursue, and in the choices they make.

GENERALIZING

What’s going on here? They and we each know something that can be useful to better solutions. *We* have the benefits of theory and comparative experience. *They* have local knowledge. Plus they are the ones that have to do it. Adapt it, morph it. Create new partnerships, meanings, and motivations.

I’m writing a book now about a kind of revolution in policy research. What we might call Policy Analysis and Evaluation Version 1.0 has this stylized problem: *the* study for *the* decision by *the* decisionmaker. The objectives are clear, and so are the alternatives. Our job as policy analysts is to analyze the costs and benefits, thereby identifying the alternative with the highest expected utility. We do so with a report that tells them what to do.

But in the kinds of places I work and the difficult problems my colleagues there address, Version 1.0 is inaccurate. In reality, the problem itself needs definition and discussion. The objectives and alternatives are unclear. There is often not just one decisionmaker, and not just one decision. Policy Analysis and Evaluation Version 2.0 tries to clarify and expand objectives and alternatives, for all those affected. Version 2.0 uses a *process* that shares data, examples, and principles from around the world. When the process works, the participants (a) specify for local conditions those metaphorical equations, (b) develop new strategies no outsider could come up with, and (c) if we're lucky, forge partnerships for action.

The goal is not to insist upon "best practices," because contexts may vary so greatly as to turn *best there* into *bad here*. Nor are we talking about a t-group or a consensus-building session. Rather, the goal is a problem-solving event that builds on the best comparative data, careful case studies of "success," and principles derived from the best theories and models of complicated processes. The participants in the convening digest this outside knowledge—and then they go beyond it, as they add their indispensable local expertise and their indispensable roles as leaders and implementers of whatever will be done. The combination—data, examples, principles and theories, and problem-solving process—comprises Policy Analysis and Evaluation 2.0.

ANALOGIES IN YOUR WORK

May I now turn to the point of this talk: how do these ideas apply more generally to how you share knowledge and expertise as professors, coaches, and academic leaders? And to how you share our knowledge and experience as a Christian?

Pedagogy

Do you see analogies in teaching to what I have said about policy analysis? Is there something like a Pedagogy Version 1.0? And a Pedagogy Version 2.0, particularly at advanced levels such as superb liberal arts colleges and graduate schools?

In a straw-man of Pedagogy 1.0, you know something, your students don't. So, tell them. Give them exercises. Make them tell you back. You transfer the knowledge in your head to their heads.

Is Pedagogy 1.0, is there the risk of something like "the tyranny of experts"?

In Pedagogy 2.0, the objectives go beyond the transfer of knowledge to the development of connoisseurship, skill, passion, and creativity. Your and their pedagogical alternatives go beyond lectures and problem sets. Don't get me wrong: this isn't sitting around and talking about what's important. As professor, you still provide tools and theories, facts and data, and great examples.³ In your doing these things with able students, do you create in your classroom something like a convening, where students engage with the material in ways that lead not only to mastery but to creativity?

³ I like Matthew Arnold's goal of sharing "the best that has been said and thought," understanding of course what a daunting responsibility it is to try to define *the best*.

Sharing Faith

Finally, let me ask you about Christian witness. Are there also Versions 1.0 and 2.0 of Sharing Your Faith?

To be provocative, imagine a Version 1.0 that says, “We have the truth, you don’t. Because you don’t, you face bad things in your life and hereafter. Listen up: believe what I tell you, and things for you will be much better.” Four spiritual laws, the Apostle’s Creed, rituals and sacraments (depending on our brand of Christianity). Oh yes: “Do this, don’t do that.”

And may I gently ask, “Could something like the tyranny of experts develop in faith-sharing?” In his Depression-era novel *Heaven’s My Destination*, Thornton Wilder describes a young man full of religion, who eagerly launches forth to share his Christian faith with the world. On a train, George Marvin Brush sits next to an old man. The two begin to talk. Immediately, the old man lays a fundamentalist pitch on the startled Brush. He gives George almost no chance to speak. The older man has the faith, and, by God, he is going to share it. George can’t even say, “I know, I know—I’m saved just like you!” He has no choice but to withstand the onslaught, and through his ordeal he may ascertain that the old man’s method is not a successful way of sharing (Wilder 1934: 92-5).

What might Sharing Your Faith Version 2.0 be like? It recognizes that *we* and *they* have valuable contributions to their creative problem solving. Thank God, we have knowledge and experience beyond their lives. They know their problems better than we ever can. Only they can specify what our words—the Lord’s words—mean in their lives. Only they can take the Good News and turn it into action. Only they can go beyond *believe this, not that, and do this, don’t do that*, and receive grace—each in a way uniquely hers or his.

To do this, we need a process that engages our interlocutors and invites God to join the convening.⁴ *How* we share affects what message is received. I love a line attributed in various forms to Francis of Assisi, “Wherever you go, preach the gospel—if necessary, with words.” If we are to convey a message of love, must we not do so with love?

Thank you for receiving these ideas about sharing expertise. How do they resonate with your experience as teachers? Do they give you ideas about Pedagogy 2.0? And about Sharing Your Faith 2.0? I’m eager to learn.

⁴ I cannot resist a completely different analogy: Robert Schumann’s list of the conditions needed for the beautiful to appear:

Consider how many circumstances must favorably unite, before the beautiful, in all its honour and glory, can appear! We need 1. lofty, deep intention, and great ideality; 2. enthusiasm in description; 3. technical power and harmonic facility closely combined; 4. an inward need of giving and receiving, a momentarily favorable mood both in artist and listener; 5. a fortunate combination of outward circumstances; 6. sympathy of expression, feelings, views; a reflection of artistic joy in the eyes of others. Is not such a combination a happy cast, with six dice, of six times six? (Schumann 1891: 73).

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