

Gritty lessons and pearls of wisdom: using oral history interviews to draw deep insights from past action, illuminate heritage and catalyse learning

Stephanie Colton and Victoria Ward

What follows is a ‘factional’ (factual in essence but dipped in fiction to protect the identity of our clients) correspondence between the authors during an oral history project for an international development institution celebrating its 40-year anniversary, playfully dubbed the Responsible Earth & Sea Development Agency or RESDA. Insights are drawn from a number of client assignments undertaken over the last 8 years that put story capture tools to work in the context of attempting to achieve broader strategic knowledge management objectives. In this case Victoria Ward – founder of Sparknow – was participating in the creation of a knowledge management strategy programme and acting as advisor to Stephanie Colton, who was project managing the experimental oral histories strand. The authors have taken the liberty of writing an extended piece in order that others might benefit from specific, contextualised insights not reduced to general headings. The letters cover parts of the process that might be interesting to others, including:

- Writing the brief
- The rationale for using oral histories in knowledge management (KM)
- Writing and briefing interviewees
- Process timeline and capacity building
- Risks in a complex project
- Placing the person at the heart of the process – emerging lessons
- Analysis or ‘picking out the good bits’
- Evaluation – what could we do differently next time?
- Advice for future oral historians

From: Stephanie Colton <Stephanie@sparknow.net>
To: Victoria Ward <Victoria@sparknow.net>
Date: January 1st, 2005
Subject: Writing the brief

Dear Victoria,

I’m so glad to hear that things are moving on apace. Just to keep you in the loop here’s the brief we’ve agreed with RESDA for the oral histories strand. It would really help me if you could take a look and tell me how you see it fitting with our KM Strategy stuff: -

PROJECT BRIEF: Evidencing the history of RESDA through the creation of a collection of re-useable Oral Histories, using sound, image and text. Specifically to:

- * commemorate RESDA's growth by collecting stories of the genesis of structures, relationships, ideas and products;
- * 'release' tacit knowledge of long-serving and retired staff members including reusable success stories and lessons learned;
- * build internal capacity to elicit empirical knowledge not represented in formal record;
- * engage and induct into the heritage and conscience of the organisation;
- * complement more structured exit procedures and improve succession and hand-over processes;
- * begin to shift patterns of communication and exchange and stimulate debate on particular topics.

The approach we are taking is to:

- * align with high-level objectives for change, including RESDA's strategic KM program to validate importance of individual experiences;
- * break from traditional OH archives and make a dynamic, interactive & extendable online experience that catalyzes learning by offering users multiple entry points including keywords, topic, time, person (in addition to full transcript);
- * transfer skills & ownership of the project to ensure long-term continuation.

All best wishes,

Stephanie

From: Victoria Ward <Victoria@sparknow.net>
To: Stephanie Colton <Stephanie@sparknow.net>
Date: January 3rd, 2005
Subject: The rationale for using oral histories in KM

Dear Stephanie.

It's a good starting point, although I suspect a rollercoaster journey behind the calm descriptions. I would probably be more esoteric and obscure, saying something like: "This oral history project is an experimental exercise in using oral history, both content and process, to make visible the hidden histories in RESDA; to use the resulting histories and exhibits to create a heritage collection which would allow the Agency to build on the past in shaping the future; to use the experience and raw materials to inform the development of a sustainable framework for knowledge and change management; and to build capacity during the assignment so that the Agency would have an embryonic community of oral historians." But I think you get there rather more elegantly than I.

As far as connecting to the KM strategy, we're positioning the oral histories project as an experiment in releasing 'empirical knowledge' - knowledge gained from experience -and presenting it back in an engaging and user-friendly format. RESDA regards itself as a pioneering organization, and this focus on innovation may have led to a devaluing of 'old knowledge.' We're

suggesting they use oral history tools to draw out critical lessons within programming cycles, past experience that can be immediately put to use by other teams. We're also extolling the virtues of working with oral as well as written histories e.g. that listening to an audio story while simultaneously reading the accompanying transcript helps retain a connection between knower and known, preserving the human side of information. As the author and mythographer Marina Warner pointed out in a recent lecture at St. Donat's Castle in Wales, the creation of pathos between speaker and receiver can inspire receivers to mimic the action they see being played in their mind's eye. Change managers take note.

We're also raising the stakes, encouraging the team at RESDA to boost their ambition beyond simply creating a collection of heritage oral histories. The tools - disciplined and participative elicitation, documentation, analysis and presentation with a strong narrative bias - can be tied into improving existing evaluation and reporting processes, impact assessment and so on and should be regarded as vital instruments for knowledge management. I have in mind Donald Schon's work on reflection-in-action (thinking on our feet) and reflection-on-action (reviewing the encounter afterwards). The notion of repertoire is also a key aspect of his approach. Practitioners build up a collection of images, ideas, examples and actions they can draw on and assess new situations as both the same as, and different from, those he and she has encountered previously [Schon, D. (1983) 'The Reflective Practitioner. How professionals think in action' London, Temple Smith.]

One question: how you are going to sell oral histories, not just to the interviewees but to the rest of the organisation which might find them a bit indulgent - old people getting out hoary old self-aggrandising rehearsed stories which wallow in the good old days and have nothing useful to say about the future?

Yours truly,

Victoria

From: Stephanie Colton <Stephanie@sparknow.net>
To: Victoria Ward Victoria@sparknow.net
Date: January 5th, 2005
Subject: Re The rationale for using oral histories in KM

Dear Victoria,

You asked about how we'll go about recruiting the rest of the organisation. Here's an excerpt from the draft promotional materials for the annual conference launch that describes why and how people should take serious interest in the techniques:

A semi-structured investigation of the past through the gathering together of personal testimonies, the Oral History technique has its roots in social psychology and anthropology but is now starting to gain credibility as a vital tool for Knowledge, Change and Human Resources Management. Complementing other more structured forms of interviewing, the systematic completion of oral histories with leaving staff members can help in risk management by documenting information not usually recorded in the formal record of the organisation – experiences, memories, stories, impressions and advice. Oral histories are qualitative, personal and subjective, documenting the ‘human side’ of a professional’s working life and providing deep insights into the working practices and culture of individuals and the organisation at large. Crucially interviews are not just added to a static archive but are also used to trigger fresh discussion or thinking. In this way organisations begin to build on their pasts to shape their futures.

I thought you might be interested to know what I’ve been jotting in my field notebook... some of it could be relevant for the KM strategy:

.... How closely tied to the 40-year anniversary? The brewing sense of celebration could hinder as users may see the exercise as flimsy rather than relating it to the high-level KS ambitions. We should position to avoid undermining the long-term learning potential of the collection.

.... We’re only interviewing the ‘elders’ – retired or soon-to-retire members of staff. Will people dismiss their insights as out-dated or irrelevant? We need to present the histories back in such a way that the speaker is not necessarily the first thing visitors encounter – the collection could be arranged by topic, date or keyword instead.

... RESDA has an oral culture – not a flipchart in sight. Important stories - for example about why particular programmes were set up, how they’ve worked with peers and partners over the years – have never been officially documented. The organisation is hierarchical with only minimal communication between levels that hinders transmission too. However, one side effect of oral culture can be a greater emphasis on the importance of memory and people here do have startlingly precise memories, even when remembering events from 40 years ago.

... RESDA’s membership is multicultural, multinational and polyglot – “a miracle of harmony and diversity” according to one senior figure we met in the lift yesterday. While this may present practical issues around translation and so on, it should mean that if our sample is representative, the whole collection will offer something for everyone.

That’s all for now. Best wishes,

Stephanie

From: Victoria Ward <Victoria@sparknow.net>
To: Stephanie Colton Stephanie@sparknow.net
Date: January 21st, 2005
Subject: Inviting and briefing

Dear Stephanie,

Just connecting to the point you were making about the clarity of their memories – and I would guess the vividness of the word pictures they will paint for us – don’t forget that Weick is a

great one for the importance of 'vivid words' as a sign that an organisation is rich in renewal [Karl Weick, 'Sensemaking in Organisations', Sage Publications, 1995]. I think it's also worth bearing in mind what I said in an earlier email about the danger of people just telling rehearsed stories. Are we going to get behind polished performances to the unpolished jewels? As outsiders how will we know the difference? The RESDA trainees will play a vital role in helping unearth these previously untold narratives and we'll need to impress this on them. I've had a go at the invitation to interviewees too, though I'm not quite sure that interviewee is the right noun to describe them. Here's a snippet. Let me know what you think: -

"You will be asked to imagine you are speaking to the whole staff body, passing on critical wisdom that can be applied to everyday working situations. To create a collection that really intrigues and grabs the attention of future audiences we will be asking you to cast yourself in the role of storyteller, focusing on specific instances and avoiding general comments. We will be moving through this sequence: -

Introduce yourself	Birthplace, education and professional career before joining RESDA
Timeline	Describing key milestones in your journey with RESDA from association to present day including highs, lows, turning points, pivotal decisions, relationships and external or internal pressures
Reflections	Evaluating achievements and contributions
Success stories	Good practice examples, impact stories and examples of the Agency growing and fulfilling its mandate
Lessons learned	Hard-hitting instances where mistakes were made that should be avoided by the next generation assuming the mantle of leadership
Pearls of wisdom	What should RESDA stop/ start/ continue doing? What one piece of advice would you give someone just joining RESDA?

To kick-start the process please prepare a timeline that maps out either: I) your own transition or career with the Agency; II) the evolution of particular projects or programmes you were involved in; III) the development of the Agency as an institution. This will act as an *aide memoire*. In addition please bring along any artefacts that signify or evoke a particular place and time, for example souvenirs, photographs etc. It is crucial you bring things that can be photographed; these images will form a vital part of the final collection when it is presented back - the more intriguing or evocative the better.

The interviewer's role is to invite you to recollect under a set of broad headings. Unlike a journalistic interview this will not be an interrogation or 'question and answer' session - the focus is on encouraging you to recollect in a comfortable, open and honest manner."

It's a bit long, but should give them enough to chew on. Let me know what you think.

Yours truly,

Victoria

From: Stephanie Colton <Stephanie@sparknow.net>
To: Victoria Ward <Victoria@sparknow.net>
Date: April 21st, 2005
Subject: Process timeline and capacity building

Dear Victoria,

Sorry I haven't been in touch for ages - it's been crazy; we sent the invitations out and within a week the interviewees were lined up and ready to go. An interesting twist - when we approached people to be interviewed, they were very retiring and not believing their operational experience would be of interest to others and saying, "Oh I don't know if I have much to offer, but you should talk to so-and-so, he really has stories to tell." In the end we had to do a kind of referral thing where we approached people and asked them who they thought we should talk to, rather than approaching people directly.

Most interviewees felt comfortable casting themselves as storytellers, and in particular loved imparting their 'pearls of wisdom'. Perhaps we should rename lessons learned and call them the grit, i.e. the grit around which pearls form? Anyway, my favourite quote so far is from the introduction to the very first interview, where a retired Director said:

"As I am the first one to be interviewed, I would like to say a few words. I want to try to avoid being like the grandfather that I am, telling fairy tales that all have happy endings. I will also try to avoid giving advice or rulings."

Setting this tone his interview was an outstanding example of KS in action. Oh, before I forget, Paul asked me to send you the process timeline for your presentation: -

P.T.O.

	CORE PROCESS TIMING	CAPACITY
Feb	RECRUITING Definitions and awareness raising meetings; RESDA staff invited to submit 'burning questions'; Preparation of information pack on 'what is oral history?'; Recruitment of RESDA Oral History volunteers – the 'core team'	KNOWLEDGE A core team of 4 volunteers participated in each stage of the Core Process including: <ul style="list-style-type: none"> • design of questions • technical training including recording equipment • observation of process • interview skills practice • After Action Review and lessons learned • audio segmentation and cataloguing • mapping connections • design principles and user requirements for online collection This team will be ready to act as a central resource as the
Mar	PREPARING Design of approach and interview question framework; 2 observed test interviews; Solicitation letter and briefing note sent to 10 senior officials; Preliminary research on interviewees; Interview scheduling; Technical training in use of recording equipment.	
Apr	INTERVIEWING 'Break the ice' session with interviewees; 11 semi-structured recorded interviews (2 – 5 hours each); After Action Review sessions; Production of audio files; Transcription and translation of audio file into text; Verification and approval of transcript by interviewee.	
May	ANALYSING Each interview listened to and 'good bits' sifted out; Segmentation and cataloguing of key clips (keywords, time coding, naming, quality control); Mapping connections between segments; Building searchable archive of interviews and segments (audio + text).	
Jun	VISUALISING Reorganisation of segments crosscutting themes or connected by keywords; Building presentation layers for the online collection; Facilitating user choice and exploration within the collection by adding sophisticated search aids; Creation of display materials for the annual meeting showcase.	
		RE-USEABLE TOOLS & ASSETS 'What is Oral History?' info pack; Letter and briefing note; Interview approach and question framework; Recording equipment and skills training; Lessons learned (from AAR); Segmentation and cataloguing templates; Database and website documentation; Open source software for handling audio and text

From: Victoria Ward <Victoria@sparknow.net>
 To: Stephanie Colton <Stephanie@sparknow.net>
 Date: April 28th, 2005
 Subject: Risks in a complex project

Dear Stephanie,

I am concerned you're not allowing enough time for the analysis/ cataloguing/ segmentation part. It looks like a big task on a tight deadline and what's more, it's going to be hard to show the RESDA team how while trying to get everything done in time. Don't forget we're asking the volunteers to give their time, and since we'll be working from the audio in real time (and not the transcripts) they might find it impossible. I understand the rationale for getting everyone involved but won't this make for

uneven quality? It might be worth giving me the templates for a trial run, just to see how it feels.

Good luck!

Victoria

From: Stephanie Colton <Stephanie@sparknow.net>
To: Victoria Ward Victoria@sparknow.net
Date: April 29th, 2005
Subject: Placing the person at the heart of the process - emerging lessons

Dear Victoria,

You're right about the timing but I've decided it's better the trainees have a go than we do everything for them or outsource it. We'll see how far they get, but can always back them up. Thanks for the offer to be guinea pig. I've attached the segment templates and the audio file for the interview with the HR Director. Let me know how you get along. In the meantime I thought you might like to know how my interview with the Head of Country Operations went today. It has some great lessons in it.

In her seventies she is a charming woman but seemed tired from her longer-than-usual boat journey to headquarters - they had to pull into the harbour half way here to shelter from storms and she was wiped out when she arrived. A last minute change of plan too - instead of interviewing in her old office we were in a meeting room. I could sense her discomfort, and it was neither cosy nor inspiring. In addition, the table was rather low leaving the microphone at knee level - an uncomfortable set-up and she didn't quite know whether to lean back or lean forward. In any case it was obvious throughout and certainly constrained her.

Quite by accident the trainee oral historian and I got our seating arrangements wrong too, so although I was asking the questions the interviewee was looking at the trainee, which created an odd kind of triangle that hindered the flow and made the right kind of eye contact and body language (so necessary to create the encouragement for stories) hard to get right. Plus, and I think this is the most important lesson, she was expecting to be interviewed in Cornish. As you know my Cornish is very rusty... unfortunately so was the trainee's. After posing the first question the interviewee reeled off a long answer in Cornish and then gave quite a stilted version in English. This created a jolty and uncomfortable rhythm from the outset - we couldn't accommodate her needs and she ended up being forced to speak in English. I think it cramped her storytelling quite a bit.

Because of this rocky start we ended up skimming on her own beginnings and extraordinary career journey. As a result there were times when I felt she was disengaged or marginal in the stories, talking about RESDA at a general level or about other people's contributions.

So in summary the emerging lessons - or bits of 'grit' as you called them - are:

- Ensure someone from RESDA speaks personally to each interviewee beforehand to establish common understanding and check any particular wishes e.g. to interview in language the interviewee feels most comfortable telling stories in, whatever the extra work;
- Ensure the physical and psychological environment feels both safe and inspiring;
- Allow adequate time for the interviewee to unfold personal stories about life before the organisation places them at the centre of the process and content making them more likely to be frank when they feel they have been accorded attention in their own right.

Anyway, let me know how you get on with the segmentation template. We're starting next week, so I may not get time to talk to you in depth about it.

Thanks again, and best wishes

Stephanie

From: Victoria Ward <Victoria@sparknow.net>
To: Stephanie Colton Stephanie@sparknow.net
Date: May 2nd, 2005
Subject: Analysis or 'picking out the good bits'

Dear Stephanie,

Phew, this segmentation business is tough going. I liked listening rather than just reading the written transcript and picking the good bits out that way. It's all in the telling, as they say. Oh, and I think there's a magic formula - 'length of audio segment x 3 = length of time to catalogue'... I spent 12 hours over the last 2 days listening, scribbling in my notebook and tapping away on my PowerBook in the garden. Thank heavens for wireless technology.

By the way I spoke to Will and he's on board to come in as technical and design guru for the creation of the online collection (with an extendable navigable archive behind the scenes). Give him a call. Back to the Strategy stuff, which by the way is starting to become quite interesting...

Victoria

From: Stephanie Colton <Stephanie@sparknow.net>
To: Victoria Ward Victoria@sparknow.net
Date: June 1st, 2005
Subject: Re Analysis or 'picking out the good bits'

Dear Victoria,

Sorry it's been a while since we last spoke. You were right; this segmentation has been exhausting. Thanks so much for testing it. I showed the team your completed segment templates as examples. The team was so brilliant and got stuck into this labour-intensive work, bearing with us as we experimented with new ways in processing, synthesising, segmenting, cataloguing, mapping and visualising the rich data to produce a navigable collection. I had to remind them that our approach has been to do something innovative, that unlike

more traditional oral history collections - where interviews are transcribed and uploaded to sound archives in full, and often left to gather dust - we want the RESDA collection to be designed to offer users the choice of how to view the information. Where some users might want to listen to the whole interview, others may simply wish to hear what everyone said about a particular topic or episode, say boatbuilding, or the sustainable tin mine story, or the time when the senior management team got shipwrecked. The interface should also facilitate exploration, with 'dead ends' kept to a minimum.

Each member of the team listened to 4 - 10 hours of audio, identifying and cataloguing those segments (and the corresponding section of written transcript) they felt would be of most value to the rest of the organisation. Time codes, keywords, dates, and quality control ratings were attached as markers to enable future searching across the collection of clips. We then met for a final two-day session during which we pooled our findings before building a map of the segments, arranged around the core themes that had emerged. We now have: -

- A definitive list of the interviews, with speakers, summaries and notes;
- A library of audio clips, consistently and thoroughly described and summarized;
- A lexicon containing all the descriptive terms that have been attached to clips;
- A catalogue of the key themes and topics that have emerged from the analysis.

Since then Will and I have been immersed in the fiddly business of making time codes accurate, recording English translations (Chris in his best public speaking voice), trying to transcript text to correspond with each voice clip, etc. I'm not sure I can bear to look at a time code again, quite honestly.

That's all for now. Will and I are doing an informal evaluation tomorrow. I'll let you know how we get on.

Stephanie

From: Stephanie Colton <Stephanie@sparknow.net>
To: Victoria Ward Victoria@sparknow.net
Date: June 2nd, 2005
Subject: Evaluation - what could we do differently next time?

Dear Victoria,

Me again. Here are the headlines from our informal evaluation session yesterday, bearing in mind these are thoughts for Sparknow's continued work and not for RESDA to take on:

- While the audio and text combination works well, the collection lacks illustrations. I'm pretty sure we were right not to use video - talking heads are not that interesting to watch - but it does mean we'll need to find other ways to bring images in, for example by listening for objects and artefacts, even metaphorical ones, locations, characters that can be photographed to sit alongside the story. We missed a trick by not hooking up with the RESDA museum and archive. I know the change team have been able to

use both really well to create a roving exhibit about cultural change and we could really have used the skills of the curator to help us think about objects and exhibit in relation to the audio materials;

- We only interviewed the great and the good this time, but what about the dinner ladies in the canteen? The receptionist who has been there for 18 years, the man who pushes the buttons in the lift and delivers the mail? These are hidden histories and small daily rituals with just as much importance as the big stories of mission and high-level decision-making.

All best,

Stephanie

From: Victoria Ward <Victoria@sparknow.net>
To: Stephanie Colton <Stephanie@sparknow.net>
Date: June 5th, 2005
Subject: Re Evaluation- what could we do differently next time?

Dear Stephanie,

Thanks for the notes. One thing we should repeat is the way we named particular episodes we were told, using their words, to make the segment feel more like a story and to create intrigue, an example being the story we called 'The Dusty Winds of Khartoum: Endings and Beginnings' or 'Crossing Drought-Ridden Sub-Saharan Africa on Dirt Roads: The Value of Leaving the Headquarters' or 'The Beggar of the Public: Making the Transition from Recipient to Donor.'

We should bear in mind the radio ballads that Charles Parker produced for the BBC between 1958 and 1983. They are now in Birmingham City Archive, so we should really go up there for a trip. But they've also just been re-produced by Topic Records and I really think we should get Sparknow a copy. Just look at some of the titles:

The Ballad of John Axon - death of a heroic train driver
Song of a Road - building the first motorway
Singing the Fishing - North Sea herring fishermen
The Body Blow - the battle against polio

Charles Parker called the ballads 'folk orchestration' and they really are sonata-like compositions. Some of the story telling is incredibly skillful - like traditional storytellers they had a great sense of timing and developed the story through direct rather than reported speech. And we have quite a bit of that vibrancy in our raw materials too, since some of our interviewees are extraordinary storytellers. In our next project we should extend beyond the pure sound of voice to music, the sounds of life - footsteps, street sounds, children singing and chanting in class, sounds of the fieldwork in action.

I think we should draw this correspondence to a close now, since the deadline for the KM4Dev journal is looming. What, I wonder, would be your advice to anyone thinking of conducting oral history interviews?

Yours truly,

Victoria

From: Stephanie Colton <Stephanie@sparknow.net>
To: Victoria Ward <Victoria@sparknow.net>
Date: June 7th, 2005
Subject: Advice for future oral historians

Dear Victoria,

Advice... well certainly we found that nesting the project inside a broader programme such as the KM strategy work gives it instrumental purpose. And the very act of the oral histories, in their long, slow, unfolding and the different qualities (long interviews, minimal interruption) enacts a different pattern of communication and exchange.

I would go back to the training that Roger Kitchen gave us, and his four golden rules of collecting [- I found a link to it at http://22villages.22plus3.co.uk/oral_history_workshop.htm too]:

1. You only get what you ask for... so you have to do the research to figure out what you want to find out). Complement general questions with more specific ones tailored to each individual. Open questions, always.
2. Be interested... Having your voice valued for the first time can be intense and you will encounter great humility, even amongst experienced personnel. Taking an interest in the smallest detail can draw people into richer recollection. Eye contact makes a huge difference (although sustaining it may be culturally inappropriate) and so does not looking at the tape recorder or watch, or taking notes. Practice to establish the necessary rhythms, silences and gestures of encouragement.
3. Listen, keep hold of clues and don't interrupt the flow... There are both obvious and subtle differences between this form of interviewing and a more journalistic style. In essence in an oral history interview the interviewee is not being interrogated and asked for their opinions; they are being invited to recollect. Interject to keep things moving along but remember even simple clarifications of a date or name can throw speakers off the path they were on and impoverish the results.
4. Respect the individual... You may hear the same story from many angles, so it could be tempting to think you have a better grip on the story than the teller and stop listening. Think about how the interviewee's age, gender, status or personality is affecting your attitude to them in the moment. Try to be mindful of your behaviour and control frustration or reticence where it occurs. At all times strive to maintain positivity and openness.

There are so many small lessons about the practicalities, it is hard to know where to start, but perhaps I could end with the words of one of the interviewees, on being asked what advice he would give to someone new joining RESDA:

"Enter into the spirit of things. And be patient. It takes time to understand and make a difference."

Anyway, I'm really looking forward to our summer solstice cold swim in Lake Geneva after the KM4Dev workshop. Thanks so much for all the encouragement over the last few months.

All best wishes,

Stephanie

About the authors



Stephanie Colton began work with Sparknow in 2001 following two years in the knowledge team at Wolff Olins, a leading brand and communications consultancy. With a background in social anthropology Stephanie leads the story practice at Sparknow and specialises in embedding narrative qualities into the design of key interfaces, creating opportunities for people to exchange experiences and promoting meaningful dialogue between business and the arts. In 2004 Stephanie founded Inside : Outside, a partner of Sparknow specialising in oral history work and cutting-edge web techniques that enable the collection and release of valuable experiences using sound, text and image.

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Victoria Ward started work in financial futures in the City in 1981 following a degree in modern languages and art. She set up Sparknow with Claudine Arnold and Neil Nokes in November 1997. Sparknow's intention is to honour the human spirit in the workplace. Much of its work is to do with narratives and story at work, the role of the physical workplace in nurturing knowledge sharing and risk taking, and the development of resilient communities which bridge organisational boundaries.

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