

Measuring the Unmeasurable? Toward a Transformative Knowledge Balance Framework for Spiritual Knowledge Management

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Abstract: Spiritual Knowledge Management (SpKM) extends conventional Knowledge Management by understanding knowledge not merely as a resource to be captured, stored, shared, and applied, but as part of a transformative process through which individuals, teams, and organizations move from a current version toward a future best version. This creates a fundamental methodological challenge: if SpKM is concerned with meaning, resonance, responsibility, practical wisdom, psychological safety, and future-oriented transformation, how can it be assessed without reducing it to conventional performance indicators or superficial measures of spirituality? This conceptual paper addresses this question by developing first ideas toward a non-reductive assessment logic for SpKM. Building on the Joching Manifesto of Spiritual Knowledge Management, the paper argues that the assessment object of SpKM is not yet sufficiently clarified. Possible objects include progress toward the future best version, knowledge practices and enabling conditions, the tension or resonance between current and future versions, and the observable traces of transformation. To frame this problem, the paper introduces the viticultural concept of physiological balance as a heuristic. In viticulture, physiological balance refers to the relationship between vegetative growth and yield performance. Translated into SpKM, this metaphor suggests two analytical axes: the development–impact axis and the capacity–demand axis. The paper further discusses the limits of empirical measurability and identifies psychological safety as an enabling condition for making relevant SpKM signals communicable. The contribution of the paper is not a validated measurement instrument, but a conceptual direction for future SpKM assessment.

Keywords: Spiritual knowledge management, Knowledge management, Physiological balance, Assessment, Psychological safety, Future best version, Knowledge metaphors

1. Introduction

Knowledge Management has undergone several significant transformations over the past decades. Early approaches were often shaped by the assumption that knowledge could be captured, stored, transferred, and reused as an organizational asset. In this view, knowledge management was closely associated with codification, repositories, databases, expert systems, and organizational memory. The central question was how knowledge could be made available, accessible, and useful for organizational performance. Subsequent developments in Knowledge Management broadened this understanding. Knowledge came to be seen not only as content or information, but also as socially embedded, practice-based, relational, and context-dependent. Consequently, the attention shifted from the storage of knowledge to the social and practical conditions under which knowledge emerges and becomes meaningful in action. More recently, Knowledge Management has increasingly engaged with questions of ethics, sustainability, responsibility, practical wisdom, and the common good. This shift is reflected in the literature on responsible knowledge management, knowledge dynamics, organizational wisdom, phronesis, and wise leadership (Bratianu & Bejinaru 2023; Nonaka and Takeuchi 2019, 2021; Rocha, Kragulj and Pinheiro 2022; Rowley and Gibbs 2008; Kragulj 2022; Durst 2024). These developments indicate that the value of knowledge cannot be reduced to efficiency, productivity, or competitive advantage alone.

Spiritual Knowledge Management (Kaiser 2023, 2024; Peschl et al. 2023; Kaiser et al. 2026) takes this development one step further. It understands knowledge not merely as a resource to be managed, but as part of a deeper transformative process. In this perspective, knowing is not only cognitive or instrumental. It is relational, ethical, meaningful, aesthetic, spiritual, and future-oriented. Spiritual Knowledge Management is concerned with the movement from a current version of a person, team, or organization toward a future best version. It asks whether knowledge practices help individuals and organizations become more resonant, responsible, wise, purposeful, and capable of contributing to a better possible future.

This shift creates a central methodological problem. Conventional Knowledge Management can be assessed through established indicators such as the number of documented lessons learned, contributions to knowledge platforms, reuse rates, search efficiency, or reductions in duplicated work. These indicators are valuable because they show whether knowledge processes are functioning. However, they do not sufficiently capture whether

knowledge practices are meaningful, resonant, ethically grounded, practically wise, spiritually orienting, or transformative. If SpKM is understood as a transformative and future-oriented approach to knowledge, it cannot simply be measured by adding a few spiritual or ethical items to existing KM performance metrics. Such a move would risk reducing the spiritual dimension to another managerial variable. At the same time, avoiding measurement altogether would leave SpKM at the level of an inspiring but empirically inaccessible concept. The question, therefore, is not whether spirituality itself can be measured as an object. Rather, the question is how the organizational conditions, practices, and developmental movements associated with SpKM can be made visible, discussable, and assessable without being reduced to conventional performance logic. This aligns with Principle 8 of the Joching Manifesto of Spiritual Knowledge Management (Kaiser et al. 2026) that provides the conceptual foundation for this paper. Consequently, this paper asks: *How can Spiritual Knowledge Management be operationalized through a non-reductive assessment framework that captures the transformative balance of knowledge practices?*

The contribution of this paper is deliberately methodological. Previous work has mainly developed the conceptual foundations of SpKM and its relevance for future-oriented transformation. This paper extends that debate by asking how SpKM can become empirically discussable without being reduced to conventional KM performance metrics. Its contribution lies in the proposed transformative knowledge balance framework, which translates the viticultural heuristic of physiological balance into two analytical relationships: the development–impact axis and the capacity–demand axis.

To develop this argument, the paper draws primarily on the viticultural heuristic of physiological balance. SpKM should not be assessed by maximizing isolated indicators or by simply extending conventional KM performance metrics. Rather, the assessment problem should be framed in a way that respects the relational, developmental, and future-oriented character of SpKM. In viticulture, physiological balance refers to the harmonious relationship between vegetative growth and yield performance. Translated into SpKM, this metaphor helps to ask whether inner development toward a future best version, external performance and impact, effort, available capacity, and developmental demands stand in a viable relationship. The paper further integrates methodological reflections on the limits of empirical measurability and psychological safety as an enabling condition for making relevant SpKM signals — such as uncertainty, overload, lack of resonance, ethical concern, and developmental tension — communicable.

2. Spiritual Knowledge Management as Transformative Knowledge Practice

Building on the development of Knowledge Management from resource-based and process-oriented approaches toward more social, ethical, and wisdom-oriented perspectives, Spiritual Knowledge Management shifts attention to the deeper transformative quality of knowing. It starts from the assumption that knowledge is not only something to be captured, stored, shared, and applied, but also a medium through which individuals and organizations relate to themselves, others, their environment, and their possible future. In this sense, SpKM extends conventional Knowledge Management by moving from knowledge as an asset toward knowing as a relational, meaningful, ethical, spiritual, and future-oriented process. The concept of spiritual knowledge (Bratianu 2015b, 2017) is particularly relevant here, as it emphasizes values, meaning, purpose, and existential orientation as integral dimensions of knowledge.

At the center of SpKM is the idea that knowledge can support the movement from a current version toward a future best version. This movement is not understood as simple optimization, performance improvement, or strategic adaptation. Rather, it refers to a deeper developmental process in which individuals, teams, and organizations become more capable of recognizing what truly matters, responding to meaningful possibilities, and transforming knowledge into responsible and wise action. Knowledge is therefore not only evaluated by its usefulness, but also by its capacity to open a path toward a better, more coherent, and more responsible future.

SpKM shows some proximity to the psychological tradition of self-actualization, particularly in its concern with human development, meaning, and the realization of potential (Maslow 1954). However, SpKM should not be reduced to self-actualization. While self-actualization primarily focuses on the development of the person, SpKM places this development within a Knowledge Management perspective. It asks how knowledge practices support meaning, responsibility, resonance, future orientation, and transformation at individual, team, and organizational levels.

This understanding changes the meaning of knowledge practices. Dialogue, reflection, learning, decision-making, and strategy formation are not only relevant because information is exchanged or new insights are generated. They become relevant for SpKM when they help clarify the relation between the present state and a

possible future best version. They may create resonance, deepen meaning, enable discernment, support practical wisdom, or make visible what needs to be transformed, strengthened, or left behind.

The Joching Manifesto (Kaiser et al. 2026) provides the conceptual background for this understanding. Its principles frame knowing as relational, ethical, transformative, and future-oriented. At the same time, the Manifesto points toward the need to make SpKM actionable and empirically approachable. This raises a fundamental assessment problem. If SpKM is concerned with the movement from a current version toward a future best version, what exactly should be assessed?

Several possibilities can be distinguished. One might assess the degree of progress toward the future best version. Yet this raises the difficulty that the future best version is not fully known in advance. It often emerges through the very process of transformation. Alternatively, one might assess the knowledge practices and enabling conditions that support such transformation, such as dialogue, reflection, resonance, practical wisdom, responsibility, and psychological safety. A third possibility would be to assess the tension, fit, or resonance between the current version and an emerging future best version. Further possibilities may also be relevant, such as assessing the transformative effects of SpKM interventions or the quality of decisions generated through SpKM processes.

Thus, the assessment object of SpKM is not yet sufficiently clarified. This paper therefore does not begin by prematurely proposing a fixed set of indicators. Instead, it starts one step earlier by asking how the assessment problem itself can be framed in a non-reductive way. Because existing measurement approaches are not sufficient to address this problem, the paper turns to heuristic resources that may help clarify the nature of SpKM assessment without reducing it too early. The first of these is the idea of physiological balance in viticulture.

3. Toward a Non-reductive Logic of SpKM Assessment

Spiritual Knowledge Management is not an easy field to grasp. It challenges conventional assumptions about knowledge by framing knowing as relational, meaningful, ethical, spiritual, and future-oriented. The problem becomes even more complex when the question of assessment is introduced. In such situations, metaphors can play an important heuristic role. As Bratianu (2015a) argues in his work on knowledge metaphors, metaphors are not merely rhetorical ornaments, but conceptual tools that help to generate new meanings and interpretive frames for understanding knowledge. Metaphors are particularly useful when abstract and multidimensional phenomena cannot be adequately captured by existing conceptual categories. In this sense, the viticultural notion of physiological balance can serve as a heuristic for thinking about SpKM assessment.

3.1 Physiological Balance as a Heuristic for SpKM Assessment

In viticulture, physiological balance refers to the harmonious relationship between the vegetative growth of a vine and its yield performance. A balanced vine develops sufficient shoots, leaves, and assimilative capacity to carry and ripen its crop, while remaining healthy, resilient, and productive over time. If vegetative growth is too weak in relation to crop load, the vine may be overburdened and unable to produce grapes of high quality. If vegetative growth is excessive while yield remains low or poorly integrated, the vine may invest energy in growth without corresponding productive expression. In both cases, the issue is not one single parameter, but the relationship between growth, capacity, yield, and long-term vitality. This is why viticultural research often discusses vine balance in terms of the relationship between vegetative capacity and crop load, for example through growth-yield relationships or leaf area to crop weight ratios (Howell 2001; Kliewer and Dokoozlian 2005).

Translated into the context of SpKM, this metaphor does not suggest that organizations should simply “balance everything”. Rather, it points to two more specific analytical relationships.

- The first is a development–impact axis: the relationship between inner development toward a future best version and external performance, value creation, stakeholder contribution, and societal impact. From a SpKM perspective, inner development should not remain purely inward, reflective, or aspirational. It should become visible in responsible decisions, meaningful action, and constructive contribution. At the same time, external performance should not be detached from the deeper developmental movement of the person or organization. Growth, output, or impact may be impressive, but they are not necessarily expressions of SpKM if they are disconnected from meaning, responsibility, wisdom, or movement toward a future best version.

- The second relationship is a capacity–demand axis: the relationship between effort, strain, transformation demands, and the available strength, potential, and developmental capacity of individuals or organizations. Just as a vine can be weakened when its crop load exceeds its physiological capacity, persons and organizations may become overburdened when performance expectations, innovation pressure, transformation demands, or future-oriented ambitions exceed their available strength, maturity, psychological safety, and practical wisdom. Conversely, available potential may remain underdeveloped if it is not translated into meaningful action and external contribution.

The metaphor becomes even more instructive when one considers how physiological balance is cultivated in viticulture. Vine balance is not a static state that, once achieved, remains stable by itself. It must be re-established each year through context-sensitive interventions such as pruning, shoot thinning, canopy management, soil and cover-crop management, and yield regulation. These practices do not simply increase growth or maximize yield. Rather, they shape the relationship between vegetative development, crop load, vine vitality, and grape quality. Pruning defines the potential number of shoots and clusters; shoot thinning and canopy work direct energy and light into the fruiting zone; soil and cover-crop management regulate water and nutrient competition; and green harvesting reduces excessive crop load in order to secure the quality of the remaining grapes.

Translated into SpKM, this suggests that transformative development also requires deliberate and recurring practices of cultivation. Individuals and organizations need to decide what should be allowed to grow, what must be reduced, which contextual conditions enable meaningful knowledge development, and where output expectations must be limited in order to protect quality, responsibility, and future-oriented transformation. In this sense, SpKM assessment should not only ask whether balance is present, but also which practices help to cultivate, restore, or protect it.

Physiological balance therefore helps to frame SpKM assessment as a question of proportion, relation, and sustainability. It does not yet define what exactly should be measured. Rather, it suggests that the assessment problem should not be approached by isolating single indicators or maximizing individual dimensions. Instead, it invites the question of whether inner development, external impact, effort, and available capacity stand in a viable and meaningful relationship. This provides a first heuristic for approaching SpKM assessment without prematurely reducing it to conventional performance metrics.

3.2 The Limits of Empirical Measurability in SpKM

The physiological balance heuristic helps to frame the direction in which SpKM assessment may develop. However, it does not remove the deeper methodological problem of empirical measurability. SpKM cannot be measured in the sense of directly observing “the spiritual” itself. If SpKM concerns meaning, resonance, practical wisdom, responsibility, and movement toward a future best version, then its central dimensions are not immediately available as measurable objects. They can only become empirically approachable through traces, enabling conditions, practices, effects, and self-reflective accounts.

This does not mean that SpKM is beyond empirical inquiry. Research on construct validity has long shown that theoretically defined constructs can be assessed indirectly through manifest indicators, provided that these indicators are conceptually grounded and empirically related in meaningful ways (Cronbach and Meehl 1955). Knowledge Management research has already used such logic to operationalize complex models such as Nonaka’s SECI model (Nonaka and Takeuchi 1995; Farnese et al. 2019). In principle, SpKM can follow a similar path. Yet the challenge is greater, because SpKM deals with dimensions that are not only abstract, but also existential, ethical, tacit, relational, and future-oriented.

Several methodological limits therefore need to be acknowledged.

- First, there is an operationalization gap: survey items may capture spiritual language or self-description rather than actual transformation.
- Second, there is the risk of common method bias, particularly if SpKM is assessed primarily through self-report questionnaires (Podsakoff et al. 2003).
- Third, the empirical foundation of SpKM is still emerging and requires replication across different institutional, cultural, and organizational contexts.
- Fourth, there is a teleological measurement problem: if the future best version cannot be fully defined externally, it remains unclear who can judge whether movement toward it is actually taking place.

- Fifth, there is a tacit-explicit asymmetry: much of what matters for SpKM may be expressed in competent practice, embodied judgment, relational quality, and lived transformation rather than in explicit statements (Polanyi 1966; Hadjimichael, Ribeiro and Tsoukas 2024).

These limitations do not invalidate the assessment of SpKM, but they caution against a naïve measurement logic. SpKM assessment should therefore not be reduced to one scale, one score, or one set of standardized items. It requires a reflective and multi-method approach that combines quantitative indicators with qualitative interpretation, contextual judgment, first-person accounts, dialogical evaluation, and attention to lived practice. This methodological caution is consistent with the physiological balance heuristic: just as the condition of a vine cannot be adequately judged by one isolated parameter, the transformative quality of SpKM cannot be captured by one isolated measurement approach.

3.3 Psychological Safety as an Enabling Condition for SpKM Assessment

A further implication of the preceding argument is that SpKM assessment depends not only on suitable indicators, but also on the organizational conditions under which relevant signals can become visible and discussable. If SpKM is concerned with meaning, resonance, responsibility, practical wisdom, and movement toward a future best version, then assessment requires access to experiences and observations that are often fragile, ambiguous, or difficult to articulate. These include uncertainty, not-knowing, ethical concern, lack of resonance, developmental tension, overload, and doubts about whether current practices truly point toward a future best version. Such signals are unlikely to surface in organizations where people fear negative consequences for speaking openly.

This is where psychological safety becomes crucial. Edmondson (1999) defines psychological safety as a shared belief that a team is safe for interpersonal risk-taking. In knowledge-intensive contexts, this means that individuals can ask questions, admit mistakes, express doubt, challenge assumptions, and offer tentative ideas without fear of humiliation or punishment. Edmondson and Bransby (2023) show that psychological safety has become a central construct for understanding learning, voice, error reporting, and collaboration in organizations. For SpKM, psychological safety is particularly relevant because transformative knowledge work requires more than the exchange of information. It requires spaces in which people can think aloud, formulate hypotheses, allow counter-hypotheses, revise their assumptions, and remain open to being changed by what emerges.

This point is closely connected to the epistemological orientation of SpKM. If knowledge is understood as a transformative practice rather than as a mere resource, then not-knowing, vulnerability, and openness are not deficits but conditions of deeper learning and the emergence of new knowledge (Kaiser and Wageneder 2026).

Genuine movement toward a future best version requires that individuals and organizations can acknowledge where current knowledge is insufficient, where existing routines no longer serve, where ethical tensions arise, and where performance expectations exceed available capacity. In this sense, psychological safety is not simply a pleasant organizational climate. It is an epistemic condition for SpKM because it enables the articulation of precisely those experiences that make transformation possible.

Psychological safety also has direct implications for the two analytical relationships introduced through the physiological balance heuristic. With regard to the development–impact axis, psychological safety allows individuals and teams to question whether external performance, growth, innovation, or stakeholder contribution are truly connected to inner development, meaning, and responsibility. Without psychological safety, organizations may continue to celebrate output while suppressing the question of whether this output is aligned with their future best version. With regard to the capacity–demand axis, psychological safety makes it possible to name overload, excessive transformation pressure, lack of resources, or the exhaustion of available potential. Without it, imbalance may remain hidden until it becomes visible only through disengagement, cynicism, conflict, or failure.

Psychological safety should therefore not be confused with SpKM itself. It does not guarantee resonance, wisdom, responsibility, or transformation. However, it is a necessary enabling condition for assessing them. An organization that lacks psychological safety may still collect survey data, but such data are unlikely to reveal the deeper tensions, hesitations, and developmental signals that matter for SpKM. Conversely, an organization with high psychological safety can create the communicative conditions under which SpKM assessment becomes more than measurement: it becomes a reflective learning process. People can speak about what is not yet clear, what does not resonate, what feels ethically problematic, what needs to be left behind, and what possible future begins to call them.

For this reason, psychological safety should be included in future SpKM assessment approaches not merely as one variable among others, but as a condition that shapes the quality of the assessment process itself. It determines whether people can participate honestly in reflecting on the relation between current and future versions, between development and impact, and between demands and available capacity. In this sense, psychological safety forms a bridge between empirical measurability and transformative learning: it makes the relevant signals of SpKM assessable by making them communicable.

4. Conclusion and Outlook

This paper started from a central methodological challenge for Spiritual Knowledge Management: if SpKM is concerned with meaning, resonance, responsibility, practical wisdom, psychological safety, and movement toward a future best version, it cannot be assessed by simply extending conventional KM performance metrics. At the same time, avoiding assessment altogether would leave SpKM conceptually inspiring but empirically and practically underdeveloped.

The contribution of this paper is conceptual. It proposes that future SpKM assessment should be developed as a non-reductive and relational assessment logic. The viticultural concept of physiological balance served as a heuristic for this purpose. It helped to show that assessment should not focus on isolated indicators or simple maximization, but on meaningful relations: particularly between inner development and external impact, and between transformation demands and available capacity. These two relations were described as the development–impact axis and the capacity–demand axis. In addition, the paper argued that SpKM assessment requires methodological caution and psychological safety: caution because the spiritual dimension cannot be measured directly and psychological safety because relevant signals such as uncertainty, overload, lack of resonance, ethical concerns, and developmental tensions only become visible when people can speak openly about them.

The paper does not present a validated measurement instrument. Rather, it provides a first conceptual direction for developing one. Future research should therefore proceed in several steps. First, the assessment object of SpKM needs to be clarified more precisely. Future studies should distinguish whether they assess progress toward the future best version, enabling knowledge practices, developmental tensions, traces of transformation, or the quality of decisions and actions emerging from SpKM processes. Future research should also clarify how SpKM assessment operates across levels. At the individual level, it may examine meaning, resonance, responsibility, and movement toward a future best version. At the team and organizational levels, it should examine whether knowledge practices create conditions for psychological safety, shared reflection, responsible decision-making, and future-oriented learning. Second, the two proposed axes need to be theoretically refined and empirically explored. The development–impact axis requires further work on how inner development, meaning, resonance, and practical wisdom can be related to external performance, contribution, and societal impact. The capacity–demand axis requires further work on how transformation demands, effort, and organizational pressure can be related to available strength, potential, maturity, and developmental capacity.

Third, future research should develop concrete indicators, reflection questions, and qualitative protocols that correspond to these axes without reducing SpKM to a psychometric score. This will require a mixed-method approach combining quantitative indicators, self-assessment, qualitative interviews, dialogical reflection, observation of practices, and contextual judgment. Fourth, pilot studies should test whether the proposed logic is meaningful in different contexts, such as schools, universities, coaching processes, non-profit organizations, public institutions, and business organizations. Such studies should also examine how psychological safety influences the quality and honesty of SpKM assessment.

Fifth, future work should translate the conceptual framework into practical assessment formats. One possible direction is the development of a dashboard-like reflective assessment tool. Such a tool should not function as a control or ranking instrument. Rather, it should support individuals and organizations in identifying imbalances in their knowledge-related development and in reflecting on how these imbalances can be cultivated, restored, or transformed. In this sense, the dashboard would not measure spirituality as such, but would make visible relevant relations, tensions, enabling conditions, and developmental movements.

Overall, the paper suggests that the guiding question for future SpKM assessment should not be: How much spirituality does an organization have? Rather, the question should be: Are its knowledge practices, developmental movements, impacts, demands, and capacities aligned in a way that supports responsible movement toward a future best version?

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