



## **An introduction to Action Learning by Brad Bamfield The Solution Organisation**

Action learning was developed in the 1940s by Reg Revans when he set up management development programmes for the National Coal Board. Reg Revans died on the 8th January 2003. In the 96 years of his extraordinary life he was an astrophysicist, Olympic athlete, educational administrator, university professor and international management consultant to industrial and commercial organisations.

His original training as a scientist enabled him to devise a new process for management development recreating the benefits of the research laboratory where colleagues share and compare problems, ideas and solutions. He called it action learning.

In creating the practice of action learning for the National Coal Board Reg Revans enabled managers to learn from each others' best practice. He allocated them groups which he called action learning sets where they could gain support and confidence from peers and introduce new ways of working. He was able to demonstrate that action learning was successful by measuring coal pit productivity – membership of an action learning set improved the pit's performance.

Action learning has developed in the last sixty years as a method for individual and organisational development. As a process action learning can be challenging and informative. Within organisations Reg Revans described it as "the upward communication of doubt" – an opportunity for individuals to engage in learning and identifying action which could make a positive difference to the organisation's effectiveness. Reg Revans was, for example, one of the first to introduce to the National Health Service the idea that nurses, doctors and administrators needed to listen to and understand each other. He uses action learning sets to create this opportunity.

### **Action learning**

Action learning can be defined as a process in which a group of people come together more or less regularly to help each other to learn from their experience.

As Reg Revans used and described it, it was mostly used across different organisations. That is, the participants typically came from different situations, where each of them was involved in different activities and faced individual problems. Most commonly the participants have been managers, though this is not essential.

The current practice more often now is to set up an action learning program within a single organisation and it is not unusual for a team to consist of people with a common task or problem.

Both approaches have benefits and disadvantages and the one to select usually depends on the actual and personal situation you are in.

There may or may not be a facilitator for the learning groups which are formed. Revans mostly avoided them however, current practice is mostly to use them.

Action learning involves working on real problems, focusing on learning and actually implementing solutions. It is a form of learning by doing.

It has been successfully applied to a wide range of situations in industry, commerce and the service sector as well as in other fields of human endeavour across Western and Eastern Europe, North America, Africa, India, China and Australasia.

Relevant to us, Action Learning has specifically it has been used to:

- tackle strategic problems at board level;
- help the unemployed start their own businesses;
- develop skilled managers for new responsibilities;
- improve productivity in retailing and manufacturing companies;
- bring about major change in large organisations; and
- improve services in health and education.

### Action Learning Methodology

Action learning is based on the radical concept of:

$$L = P + Q$$

- **L** - learning requires
- **P** - programmed knowledge (i.e. knowledge in current use) and
- **Q** - questioning insight.

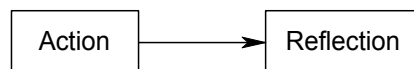
It also uses a small group to provide challenge and support: individuals learn best with and from one another as they each tackle their own problem and actually implement their own solution.

The process integrates:

- research (into what is obscure);
- learning (about what is unknown); and
- action (to resolve a problem)

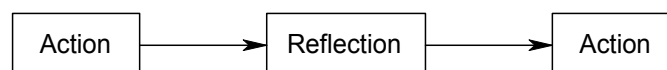
into a single activity and develops an attitude of questioning and reflection to help individuals and organisations change themselves in a rapidly changing world.

Consider the following simple learning cycle which captures the main features of action learning. Action Learning at its simplest, it consists of two stages: action and reflection:

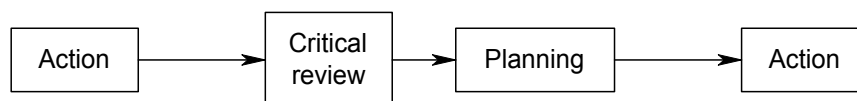


in an ongoing series of cycles.

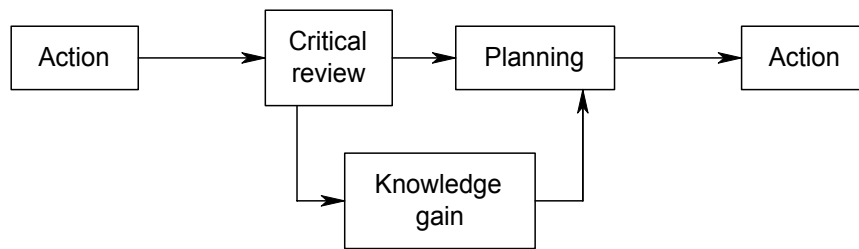
However, the reflection becomes crucial by leading to learning, which in turn leads to changed behaviour in the future, before the next action:



We can therefore expand the reflection component to take into account that it is partly a critical review of the last action and partly planning for what will happen next.



We can now add "theory" or knowledge. In the Critical Review we can only make sense of the world<sup>1</sup> (i.e. what has happened) by applying our prior knowledge and understanding. In adding new knowledge or processes and enhancing our understanding, we become better able to act on the world.



When we are in the action phase, we often don't have the time to be deliberate about what we are doing and the "theories" we draw on are intuitive theories. We jump to the conclusion and act. In the Critical Review and Planning phase our theories can be considered and made explicit.

In other words,

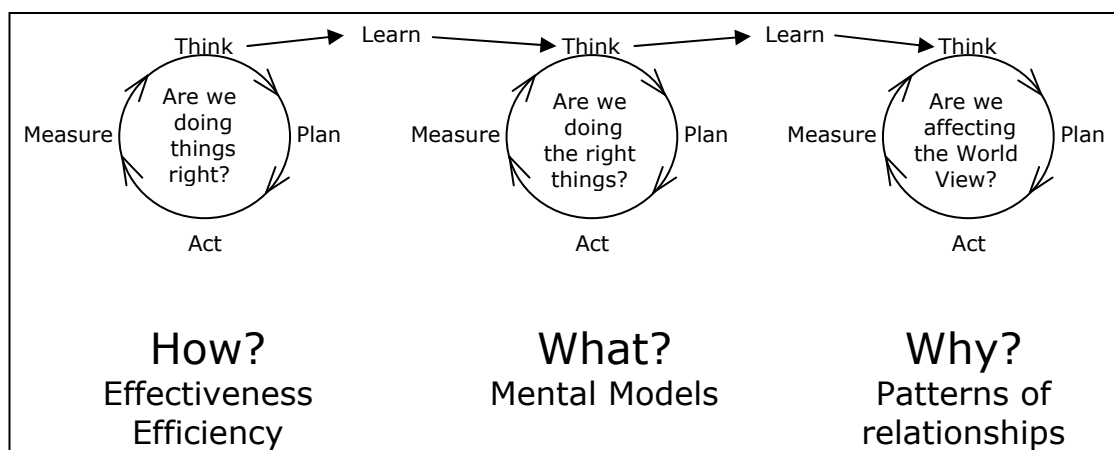
- Action is usually informed by intuitive theories.
- Critical Review and Planning are informed by conscious theories and assumptions which are derived deliberately from recent experience, and used to plan the next set of actions.

Action Learning works by a dual alternation:

- between action and reflection and;
- between unconscious and conscious theories.

By combining both of these processes in a cyclic procedure, we integrate them and begin to develop the Learning Organisation which asks the questions;

- Stage 1 - Are we doing things right?
- Stage 2 - Are we doing the right things?
- Stage 3 - Is what we are doing changing things?



It is generally recognised that, although we all do this naturally and often subconsciously, organisations and businesses now need to become much better at being 'learning organisations'.

<sup>1</sup> "World" in this context means the environment that surrounds the issue not the Earth of global events.

Learning organisations recognise the impact of global communications, new technology and the dramatic increase in information, and they understand that they will have to continually reorganise, restructure and develop new skills.

A learning organisation keeps expanding its knowledge – not academic knowledge but knowledge that helps the organisation or business function effectively. It encourages individual and group learning by providing access to information and resources, and opportunities for developing skills and new attitudes.

It encourages a desire for continuous improvement. The key factor in this process is not what organisations know but rather how quickly they can learn. Thus, a learning organisation is one that makes learning a part of its work i.e. part of everyone's job description.

Consider where your organisation is now, which loop you are in.

Action Learning provides one method of achieving these Learning Organisation aims. It is a powerful action-oriented, problem solving tool, as well as a key approach to individual, team and organisational development.

### **So, what is Action Learning in reality?**

Action Learning (often known as AL) is a practice which enables managers<sup>2</sup> to develop themselves and their organisations. It is based on the principle that people learn best from what they are doing and that they have an unlimited capacity to learn from experience but a limited capacity to learn from being taught.

At the heart of the process is the 'action learning set'. This is a group of 4-6 individuals who meet at regular intervals for each member to explore a challenging open-ended problem or opportunity. Every member in turn works on his or her 'task' and the others as 'friends' provide support and challenge. The aim is to help each member both to tackle the task and to learn from this.

Action Learning focuses on learning at 3 levels:

- about the problem which is being tackled
- about the participant as a person trying to make things happen
- about the process of learning itself.

It is a process of learning and reflection, supported by this small group or 'set' of people with the intention of moving issues forward. Individuals learn with and from each other by working on their own particular situations and reflecting on their experience. At TSO we prefer the term 'team' instead of the official 'set' so from now on we will use team.

AL recognises that professional development comes from a combination of knowledge, skills and personal growth. People bring the whole of themselves to the process and have the freedom to explore as much as they feel comfortable doing, without making a firm boundary between work and non-work. Over time team members build a deep understanding and trust of each other, which allows both a high degree of support and positive challenge. This helps people take an active approach to the pressures of life and work.

Perhaps the greatest value of the AL process lies in its capacity for equipping individuals, teams and organisations to respond more effectively to change since it promotes fresh thinking and new ways of looking at and dealing with situations.

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<sup>2</sup> We use a broad definition of manager being 'people who take responsibility for their lives and work'; therefore within organisations all staff can be considered.

One previous AL participant reported;

*'It is very powerful to share one's story, and to share it with a friendly stranger is even more powerful. The set was one place where I could express my self-doubt about our strategic direction and relationships with stakeholders. It gave me the confidence to make difficult choices. Part of this success has come through knowing that this group of people is there to talk to. You need to take time to work on yourself – you owe to yourself and your organisation. AL is about giving'.*

AL derives its strength from the interaction of six elements:

- a problem,
- the group,
- the questioning and reflection process,
- the resolution to take action,
- a commitment to learning,
- a facilitator (and then successful self-facilitation).

### **When is AL useful?**

People in senior positions, paid or voluntary, often have difficulty finding others who are able and willing to explore work situations and offer objective evaluation of possible courses of action. AL can alleviate this problem because it can simultaneously address: problem solving, organisational learning and development, team building, and personal and professional growth and leadership development.

It is particularly useful when:

- it is necessary to map out ways to deal with a new situation;
- needing to test out new ways of working and/or to change the way things are done;
- a job or role or organisation is changing;
- faced with major challenges;
- looking for continuous management development.

### **What are the benefits of AL?**

AL offers:

- problem solving time;
- support, feedback and positive challenge from peers who understand each others work, but have no vested interest in the outcome;
- a safe environment to explore personal and professional strengths and weaknesses, take risks, experiment and ask for help;
- the bringing together of skills and the opportunity to learn from good practice;
- an antidote to isolation and a group of people who become, for short periods of time, mentors for each other;
- an opportunity to express feelings as well as facts about their work situation;
- an opportunity to hear and be heard;
- learning by doing and developing how-to-learn skills;
- a move from a culture of training (where someone else determines/provides the tools for others development) to one of learning (in which everyone is responsible for his or her continuous development).

### **What skills do participants of AL sets gain?**

- Improved communications and teamwork.
- Empathy, a non-judgmental attitude, listening and diagnostic skills.
- Greater self awareness, insight into hitherto unknown hidden resources and self confidence.
- Facilitation and coaching skills.
- Insight into the way individuals relate in a small group which increases understanding of work relationships.
- Ability to ask better questions, review, critically reflect and get to the heart of a problem.
- Increased ability to take an active rather than passive approach to life.

### **Why do we learn so well from an Action Learning set ?**

- AL embodies a number of key learning principles:
- Learning is increased when we are asked questions and reflect on what we did in the experience, when we are given time and space to deal with problems, when we can see results, when we are allowed to take risks and when we are encouraged and supported.
- We can learn critically when we are able to question the assumptions on which our actions are based, ie. when we receive feedback from others and from the results of our problem-solving actions.
- When relying totally on experts we can become immobilised and fail to seek or trust our own solutions.
- Non-hierarchical groups from across organisations or departments and functions are often better able to gain new perspectives.
- Group responsibility for the task empowers the members and enhances learning.
- We are most challenged when we work on unfamiliar problems in unfamiliar settings, where we can unfreeze some of our previous ways of doing things and develop new ways of thinking.
- By working co-operatively with others on real issues, the group can move to a higher level of learning.
- People learn when they do something, and they learn more as they feel more responsible for their task.

### **But what AL is not**

Although AL may share the characteristics of other types of group work it is a unique process. It is not: a task force, learning and reflecting on the job, an outdoor adventure, a simulation exercise or a discussion group. Nor is it group work, a lecture or training session, advice giving, counselling or group therapy.

### **What actually happens in an action learning team?**

A group of about six people working in related fields and at comparable levels of management responsibility, meet regularly for a contracted number of meetings, which is usually five or six, over twelve to eighteen months. Initially you can work with an external facilitator who acts as catalyst and coordinator, supporting you throughout this process.

At the end of the initial contract, you as team members decide whether or not to continue meeting for a further contracted period, and whether to work on your own or with a facilitator.

At each meeting there is a disciplined process and should follow the same procedure:

- **Report in.** Team members report briefly on what has been happening to them including, for those who presented last time, any actions/resolutions on the presented topic;
- **Bidding process.** Team members decide between them who is going to present a particular situation that s/he currently face (in some groups time is divided equally so all members present which how we are conducting this set of seminars);
- **Presentation.** The presenter talks, without interruption and for as long as they wish, about their problem/situation/challenge;
- **Questions.** When it seems appropriate the space is opened up to the group to ask questions. These questions will be designed to assist the presenter come to deeper understanding.
- **This is important** - the team does not give advice, tell anecdotes, pass judgement or talk about how it compares to their own situation;
- **Formulation of action.** The team assists the presenter review options and decide on action i.e. develop an action plan, no matter how small;
- **Feedback.** The set then reflects on the group process and gives feedback on what has taken place. At a future team meeting the presenter reports on the action taken.

The facilitator:

- enables the group to reflect on group processes
- creates safety for individual members to explore sensitive issues
- takes the group beyond superficial analysis
- keeps the group focused on the individual presenter
- ensures that group members follow action learning conventions
- enables the group to draw out general lessons on management development.

### Action Learning Conventions

AL works because it provides a safe and neutral space for people to explore sensitive and troubling issues. This sense of safety is established and maintained through a commitment to ground rules or conventions as follows:

- **The Contract** Usually the group creates their own contract together - what it is they all agree to do and not to do as a group i.e. an agreed number of meetings, being there for meetings unless it is absolutely impossible, not leaving without discussion.
- **Confidentiality** What happens in the AL Set must remain confidential. Set members agree not to discuss anything that occurs in the set with anyone within or outside the set, outside set meetings and outside the presentation time.
- **Presenter's Space (time)** The presenter gets as much time as they need to present (or the time is allcated). This space belongs entirely to them. The role of team members is to give their whole attention, appreciate the value of silence as time for reflection and ask inquiring questions.
- **'I' Language** Use of the word 'I' instead of general terms 'one', 'you', 'we', 'they', etc. is encouraged as this helps the presenter get closer to the problem/situation.
- **Open Questions** Participants may not give advice or tell stories of their own experience. They can only ask questions. Apart from a few clarification questions all questions should be open.

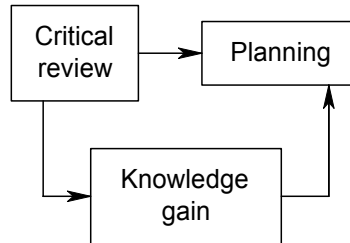
Typical AL questions might be:

- What result do you want?
- How do you feel about this situation?
- What could you do differently?
- How do you know this?
- Can you explain that further?
- What is the best possible outcome?

## The Leadership Seminars and Action Learning

Now moving onto AL and our series of seminars on developing Leadership skills.

To date we have been adding to your knowledge base to allow you to derive more value from the Reflection phase;



You also know that we focusing on improving leadership skills.

Seminar 4 will effectively complete the adding new knowledge phase of the seminars and now we will move into the section where you take control and begin to actually benefit from the course. From the end of Seminar 4 you have to define what you want to do and work to deliver it.

So you are the 'set' in AL terms – a little small but we have to live with that and Patrick and I will join as team members rather than facilitators.

We will apply the rules as sated above and please read carefully the bits on what we do not do. That also means we will draw up a Contract. I know it may sound a bit silly but it works as a process so please stick with it.

Each of the team will speak and you may choose to prepare what you say or you might prefer to speak off the cuff. Both can be successful – do what you are comfortable with.

What do you speak about? Here is a suggested structure to get the most out of your time;

- 1 Focus on the original problem or issue you identified. If your thinking has moved on since then no problem just tell us about it.
- 2 Review what you wanted to do between seminars
- 3 Review what actually happened
- 4 Think critically what the outcome was and was it better, worse, different from what you wanted/expected.
- 5 What could you have done differently that would have influenced the outcome
- 6 Tell us what you want to do next (Objectives, Strategic)
- 7 Tell us how you intend to do it (Tactical)
- 8 Tell us how you will know whet the results are (Measures)
- 9 You will speak without interruptions or questions from the team.

When you have finished the team will ask questions and help you to;

- Review the options
- Decide on action to be taken
- Develop an action plan
- Asses the measures of success

At the following seminar you will report back on what happened using the same process.

Finally during seminar 6 you will have the opportunity to decide what happens after the programme is completed;

- Will you continue to meet?
- Will you stay in touch?
- Will you continue with the personal development programme?

## References

The author gratefully recognises the contribution of the following:

Dick, B. (1997) *Action learning and action research* [On line].

Available at <http://www.scu.edu.au/schools/gcm/ar/arp/actlearn.html>

Marquardt, MJ *Action Learning in Action*, 1999, Davies -Black Publishing, USA.

McGill, I & Beaty, L *Action Learning (second edition)*, 1992, Kogan Page, London.

## Resources and further reading for more information

Action Learning;

The International Foundation for Action Learning <http://www.ifal.org.uk/ifalhomesi5.html>

NHS <http://www.natpact.nhs.uk/cms/274.php>

Learning Organisation;

[http://www.see.ed.ac.uk/~gerard/MENG/MEAB/lo\\_index.html](http://www.see.ed.ac.uk/~gerard/MENG/MEAB/lo_index.html)