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Action Learning: training and development considerations.

Pauline Joyce
Royal College of Surgeons in Ireland, pjoyce@rcsi.ie

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Action Learning

Used by many successful organisations, such as Samsung and the BBC, Action Learning supports change initiatives.

Dr Joyce outlines the training and development considerations
Action Learning: training and development considerations.

Author: Dr. Pauline Joyce EdD FFNM RCSI, MSc,
Address: Director of Academic Affairs
Institute of Leadership
Royal College of Surgeons in Ireland
RCSI Reservoir House
Ballymoss Road
Dublin 18
Ireland

Email: pjoyce@rcsi.ie
Tel: +35314028654

Abstract

This paper recommends the use of action learning to support organisational change initiatives. Action learning is understood to be a dynamic process where a team meets regularly to help individual members address issues through a highly structured, facilitated team process of reflection and action. Appropriate training and development in action learning is vital to ensure a positive experience for all involved.

Action Learning

Action learning is a process that involves a small group (set) working on real problems or opportunities, taking action, and learning as individuals and as a team while doing so. Developed by Reg Revans as the best way to educate managers, he suggested that organisations (and the people in them) cannot flourish unless the rate of learning is equal to or greater than the rate of change. According to Revans, learning has two elements to it: traditional instruction or ‘programmed knowledge’ and critical reflection or ‘questioning insight’. Action learning is known to have the following benefits:

- Solves complex problems and challenges in a systems-thinking approach
- Builds powerful teams
- Enables individuals and teams to learn while working
- Creates a corporate culture that can handle change and learns
- Develops leadership competencies
• Develops systems thinking and creativity

It is used worldwide by companies such as the BBC, Siemens, Baxter, General Electric and Samsung. The components of action learning can be grouped into 6 main areas (Table 1).

<table>
<thead>
<tr>
<th>Number</th>
<th>Component</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>The groups are presented with a project, challenge, task, problem or opportunity for improvement</td>
</tr>
<tr>
<td>2</td>
<td>A group of 4 – 8 people with diverse perspectives come together</td>
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<tr>
<td>3</td>
<td>Meetings involve reflective questioning and listening</td>
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<tr>
<td>4</td>
<td>The focus is to have a clear purpose, create solutions and take action</td>
</tr>
<tr>
<td>5</td>
<td>All members of the set are committed to learning</td>
</tr>
<tr>
<td>6</td>
<td>The set is guided by an Action Learning Facilitator</td>
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</tbody>
</table>

Table 1: Components of Action Learning

Success of Action Learning

The success of action learning is guided by 5 main principles:

1. Learning from experience and sharing that experience with others
2. Being open to the challenge of colleagues and listening to alternative suggestions
3. Having time where they are listened to (in a non-judgmental atmosphere)
4. Having more choices about the way forward
5. Reviewing the outcome of actions with the support of fellow set members and sharing the lessons learned.
The problems or opportunities can be experienced as projects. Good preparation of the participants and the facilitators in working on these projects is a key recommendation if trainers are to maximise the benefits of action learning. The questioning approach of the action learning process helps participants think before diving into action. Thus, action and learning have a dependency on each other. The facilitators use their skills to draw out participants’ questions which are open, non-judgemental and challenging. They engage participants in reflecting on their experiences in practice and their learning on the course. In an action learning set (ALS) a trust builds between set members and the facilitator. This trust may take a number of sessions but once established it can be difficult to interrupt. Any addition to the already formed groups can be viewed as interrupting a relationship of trust between members and facilitators.

**Organisation of the sets**

A diverse set of managers from the same or different organisations can be considered. They can met as regularly as is feasible. Participants can communicate with their facilitators and members by email, chat rooms or other digital media, at least once between meetings. This will then focus them in progressing their projects so that they come prepared with outputs they hoped to achieve from the process. Questions can be posed around who they communicated with about their projects, what level in the organisation were these people, what were their relationships with the staff, how did they think they could progress the project before the next meeting and what stage of the change they were at. Some participants might like to take notes on the questions asked. These can prove very useful for reflecting on the process after each set meeting. At the end of each action learning set participants communicate what action they hope to achieve before the next meeting. They also communicate if there is any particular question posed in the ALS which might encourage them to think differently about their current approach to the project. Some
questions in the meeting can really help them progress their project once they reflect on the question further.

Action learning facilitators can be allocated to the sets randomly. Self-facilitated action learning sets may not be familiar enough with the action learning process to manage this type of learning so that the sessions lack focus and purpose. Prior to commencing action learning facilitation a workshop was provided to staff to clarify the process and to address any queries. Participants need to be clear, at the outset that within the action learning process there was no place for ‘just doing nothing’. On the contrary it is about ‘action’. Participants soon understand that they need to come back to each meeting with an action point achieved. Some might have previous experience of using this process, others may have never participated in action learning sets up to now.

**Challenges encountered**

The ALS process can often bring unforeseen challenges. Participants have families and life issues competing with such commitments, as required by action learning. However, in coordinating such a group the rewards are immense. The challenges encountered in using action learning for one group are presented below under: numbers in sets and dependence on facilitators. This group were part-time postgraduate masters’ students undertaking a change project as part of their final dissertation.

*Numbers in sets*

Students on the masters programme have the option to exit after the six taught modules with a postgraduate diploma. However, this information is not always conveyed to the programme administrators by the students until after the action learning sets are formed. Meetings were
scheduled for Mondays and Tuesdays. The initial challenge around numbers in the sets only emerged on the first scheduled action learning set. In one case there were three students in one of the Tuesday groups although six were allocated. Later this group dissolved to one student as the other two students deferred their studies due to extenuating circumstances. This challenge impacted on the lone student and facilitator, who himself was a recent graduate. He had experienced action learning the previous year as a student but was new to facilitation. Rather than disrupt groups, and interrupt the relationship of trust which may have already formed between members and facilitator, a student, who requested to attend a Monday set instead of a Tuesday one, joined the lone student. The writer also took part in the meetings which then brought the number back to four. Although, not ideal, the student who had a meeting on a one-to-one basis with the facilitator (in more of a coaching capacity than action learning), stated that she benefitted greatly from the additional attendees.

*Dependence on Facilitators*

Dealing with student numbers of this size meant that dependence on facilitators attending for the sets and getting the action learning process working well were two high risks. In addition, a period of adverse weather brought an unplanned absence of one facilitator, due to an accident. This resulted in a need to match up two groups (which were assigned to him) with a replacement facilitator for the remainder of the sessions. Such unforeseen disruption resulted in challenges for the students in getting to know their replacement facilitator, at a time, when trust had built up between them. They voiced the challenge of going back to the start of the process again to update the ‘new’ facilitator. Some of these issues were further highlighted during the evaluation of the action learning process, when students felt their motivation for the projects was interrupted due to this challenge.
Evaluation of the action learning sets

It is important to evaluate the action learning process and structure once the projects are complete. Short surveys are useful but focus groups can give richer information from both participants and facilitators. The following recommendations capture some lessons learned from one evaluation process.

1. Action learning sets can be organised by a system of randomised selection. In addition to this process the composition of the sets need to be checked for diversity of groups in relation to role and expertise. Such diversity will promote challenging questions from set members.

2. The action learning process needs to be introduced as early as possible in the organisation. This will help participants come to the meetings more prepared for an action learning process. Knowledge of the process will highlight the importance of communicating their intention to commit.

3. Existing group compositions in organisations should be regularly mixed so that they get to know an array of work colleagues outside their own departments. This will help build up trusting relationships with set members early.

4. Action learning facilitators should be scheduled to attend a training session on the process prior to the start of the meetings and a follow-up meeting should be scheduled with all facilitators midway through the process. This will support new facilitators and allow them exchange tips for good practice and support them in decision-making and follow-up between meetings.
5. If a coordinator is needed to organise a number of different action learning set groups then this person should not be assigned to a group. This frees them up to oversee the process in action and to be available should an unforeseen circumstance occur to prevent a facilitator attending a session.

6. Action learning facilitators can encourage group members to connect up via chat rooms etc. between face-to-face scheduled meetings. This will promote commitment and engagement at an early stage.

Conclusion

The paper presents an overview of action learning as a useful process in training and development. It draws on the learning gained from evaluation of the logistics of setting up action learning, preparing participants and facilitators, and the process itself, based on an academic experience. Planning and good preparation of participants and facilitators are paramount to ensure that action learning supports participants as they embark on their projects. Once the process is well thought out, planned and organised the rewards are immense. It is a training and development tool which will never be out dated. Learning from this process can be transferred across all sectors and levels, regardless of the organisation focus.