World of Professional Discipline

Action Learning – Taking the Time it Takes

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Abstract

Sometimes as a facilitator you find yourself facilitating groups which are more concerned about long-term learning, behaviour change or process improvement than they are about making one or another specific decision. This is a situation in which action learning may be more applicable than either training or problem-solving per se. This article describes the action learning approach in generic terms, offers some tips on when it is and is not applicable, and provides an overview of how action-learning sessions are constructed. Comments or questions are welcome at my e-mail address above.

Introduction

There are things that you can't just take up and learn this week or sit down and decide today – some things you just have to work through, and they take awhile. This is a situation for action learning. The following poem describes well from my perspective the sort of process I'm talking about, one that took a while to work through.

AUTOBIOGRAPHY IN FIVE SHORT CHAPTERS
By Portia Nelson

CHAPTER I.
I walk down the street.
There is a deep hole in the sidewalk.
I fall in
I am lost...I am helpless
It isn't my fault.
It takes forever to find a way out.

CHAPTER II.
I walk down the same street.
There is a deep hole in the sidewalk.
I pretend I don't see it.
I fall in again.
I can't believe I am in the same place.
but it isn't my fault.
It still takes a long time to get out.

CHAPTER III.
I walk down the same street.
There is a deep hole in the sidewalk.
I see it is there.
I still fall in...it's a habit.
my eyes are open.
I know where I am.
It is my fault.
I get out immediately.

CHAPTER IV.
I walk down the same street.
There is a deep hole in the sidewalk.
I walk around it.

CHAPTER V.
I walk down another street.

What is Action Learning?

Action Learning is an approach by which a small team (generally 5 - 7 persons) contract together to achieve a learning objective through a combination of shared reflection and action. This may either be a shared learning objective (eg, our team wants to know if computer based training could suit our needs) or a collection of individual learning objectives (eg, each of us has issues we need to work through in our consultancy). The aim of this paper is to provide a broad overview of what action learning is and some tips on how to get started.

Components of Action Learning

Action learning consists of four elements: the individual, the group of 4-6 learners - called an action learning "set", the problem to be considered, and finally, action focused on the problem within the organization and the learning which occurs through this action. There are certain assumptions in action learning about each of these four components.

Voluntary Participation

First, the individual. It is assumed that action learners do so out of their own free will. You cannot require anyone to do action learning and no one can require you to do action learning, however hard you may work to convince people that this is a good approach for them. This means that a team may choose action learning as an approach to their development, but a manager requiring all staff to go to five action learning sessions doesn't yield very good results unless those employees choose to do it. This sounds obvious until you think about organizational professional development programs, in which consultants, for instance, are required to spend 100 hours in action learning to meet competency x or y. This has to be checked personally with participants. If some are not committed to investing themselves in a group process, then those consultants would be better off with another sort of intervention.

A Focus Problem

Second, action learning assumes that each individual (or the team as a whole) comes to the process with a problem that he or she needs to deal with. This has to be a problem that is owned either by an individual or by the team as a whole. Global warming is not an action-learning problem, but improving climate change sensitivity in an energy company might well bring a group of engineers together.

Part of the diversity in action learning comes from the nature of the problem the group brings. A problem here can range from a very objective entity "out there" ("Our department is being dissolved", for instance) to a thoroughly personal matter "in here" ("I just can't work with Henk", for example). An action learning set is a group attempt to tease a workable perspective out of whatever problem/s they have, to try out a solution and to learn from that trial.

A Committed Group

Third, action learning assumes a small group (ideally 5 – 7 members) which agrees to work together as a group for a set period of time. This group is called a "set". Because the intent of the group is to work through one or several issues together, the agreement of the group to stay together for a period of time is essential. A good way to do this is to contract for a fixed duration, a number of sessions, or maybe a deliverable for the group's work. That would commonly be six sessions over a year or once a week for two months, but it could equally be "until we get a viable proposal approved by

management". Either way, the group is not a revolving door. Someone who misses the first three meetings and wants to join later would need to be discussed by the group.

What sorts of groups do this? You can see that action learning is better for some groups than for others. Reg Revens distinguishes between programmed knowledge and questioning insight. Programmed knowledge is already known and defined, like the French language, for example. Questioning insight is corporate critical reflection to discover new perspectives or untried approaches.

A group that needs to learn French doesn't need questioning insight, it needs programmed knowledge -- a book or a course, perhaps. On the other hand, a group who find themselves for the first time in their lives in a self-managing team doesn't need programmed knowledge as much as they need some questioning insight. Life is not usually that simple, however. The self-managing team may well decide that they need a course on how teams are supposed to work together. Maybe some of the individuals want some coaching on communication skills. The action learning team function is to work with the questioning insight, focusing on those places that need to be thought through. You can well imagine that action-learning sets are very often a response to some change in organization or change in the job or task. The following chart plots some of the types of groups that typically use action learning.

UNDERSTANDING OF THE JOB/TASK
Familiar → Unknown

	Familiar → Unknown	
UNDERSTANDING OF THE ORGANISATION Unknown → Familiar	**GROUP TYPE 1** Familiar job familiar organization	**GROUP TYPE 2** Unknown job familiar organization
	GROUP TYPE 3 Unknown job unknown organization	**GROUP TYPE 4** Familiar job unknown organization

Group Type 1 – Familiar Job and Familiar Organization
This is a group who comes together to learn something in their existing jobs in their own organization. This is seen as the least likely sort of group to succeed with action learning, because their learning incentives are relatively low. Nevertheless, it can be an interesting approach for professional development.

Group Type 2 – Unknown Job and Familiar Organization
This is a group brought together to understand a new job set against a well-understood organizational background. This might, for instance, be a change management team

which is brought together out of line management to do what is for them a wholly new function, but in a familiar context.

Group Type 3 – Familiar Job and Unknown Organization
This is the typical consultants' action learning group, in which people have a specific task or process to introduce into a new organizational culture. They are adapting known functions to new rules

Group Type 4 – Unknown Job and Unknown Organization
No, this is no joke! – Imagine change managers or a project team in a newly merged organization. This can be an excellent opportunity for action learning because there are a great diversity of points where group reflection can help to get the group started rather than spending time trying to build a master plan for unknown terrain.

Learning through Action
Fourth, action learning is about action. Every session is a process of inventing together an action or actions that can be tested and assessed in the time between the sessions. These actions are as clearly defined as possible, and used as what you might call "reality experiments" to try something out and see what result it brings. An action might be to discuss a disagreement with a colleague, but it could also be to spend a month looking at my situation from a reframed perspective and list the new aspects I see. The action learning session itself is the taking of time and shared energy to look at what is happening, evaluate and think it through and design next steps. Mike Pedlar comments that action learning focuses on three different levels of learning:
1. about the problem that is being tackled
2. about what is being learned about oneself
3. about the process of learning itself, i.e. 'learning to learn'.[1]

Is Action Learning suited for our organization?
Not every group benefits by action learning, and before you launch your group it is worth thinking a moment about whether the action learning process would be a comfortable one for your situation. In their introduction of Action learning at Shell Exploration and Production, Arthur Anderson Business Consulting used the following distinctions:

Action Learning is About:	*Action learning is Not About:*
Learning	Teaching
Finding out	Feeding in
Collaboration	Competition
Real work issues	Classroom theory
Being active	Being passive
The here and now	Dwelling on the past
Using the team as a resource	Individuals as islands of knowledge
Being flexible	Being inflexible

While I find it hard to imagine any group which would own up to "being inflexible" and "dwelling on the past", we all work with groups who have a relatively higher and lower

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[1] Mike Pedlar, *Action Learning for Managers*, London, Lemos and Crane, 1996, p. 22.

tolerance for ambiguity and reflection. Suffice it to say that the action learning approach best suits groups who enjoy a relatively high level of individual problem ownership, who value innovative action, and for whom a few hours a month spent analyzing a problem is not seen as "wasting company time". This is not intended to make one group feel more backward than another, but rather for very pragmatic reasons. You cannot, for example, get much energy in a group to try solutions to problems that they do not own.

Having said that, you can define an action learning project in ways that are more rather than less conductive to approval in the situation. A manger has a right (it seems to me) to ask a group "what did you learn?" when he has committed thousands of dollars to their personal development. Of course it's easier if they can produce a glossy course workbook or show exam results. This is not finally a deterrent to an action learning process, although it may seem like one. One group I work with focuses on producing models and charts as visible products of what they have done in a session. They show their manager that their "productive" work on the job partly depends on their ability to think together once in a while. Another group routinely adds up how much cash they saved the company on their latest new approach, and reports back not what the process cost, but rather what the process saved.

Action Learning Sessions
So what do you actually do? You hold a kickoff meeting, a number of sessions and a closeout meeting. You may function as the facilitator yourself or encourage facilitation to rotate among the group.

After the kickoff meeting or meetings to get themselves started, the group will have a number of relatively similar sessions. Such an action learning session would be different for a group who share one problem and for a group of individuals who each bring their individual problems.

A session for a focused team
- Checking in -- A quick general introduction round. For those who use the ICA's focused conversation method[2], this is a lovely application for it.
- Reporting – Results of the actions decided last time are reported to the group. Learnings and implications are discussed.
- Action Planning – Next steps are thought through and actions determined. Any sort of workshop method is quite suitable here.
- Closing agreements -- The group makes assignments for who does what when we go back to work.

A session for diverse individuals
- Checking in -- A quick general introduction round
- Individual problem clarification – Each person gets 30 min to an hour of the group's time to report on what happened since last time and for the group to raise questions of him or her to clarify his or her situation. Alternately, each session can focus on one individual. Many techniques can be applied here. The important point is that the facilitator guard the right of the individual to understand

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[2] See Brian Stanfield, ed: *The Art of Focused Conversation*, Toronto, The Canadian Institute of Cultural Affairs, 1997.

and act on his or her own problem. This is not about advice, but rather a highly disciplined shared reflection process.

- Closing agreements -- Each individual says what he or she intends to do when he or she goes back to work.

Closing Out

At the end of an action learning process, it is time to close out. The group needs to think through what has been accomplished and what has been learned. This may involve a report to various stakeholders, the documentation of some new approach in the team's work life, the opportunity for individuals to make a personal action plan, or something else. Regardless of how you round off, be very clear that closing out is essential. This may be the only time that the group really has a chance to see what has been happening to them. Because the action learning process is extended in time, it's easy to forget at the end of a successful process just how bad the bad old days were. Use some reflection method that let's you look back at the whole period, and calls on people to remember things from every session.

At the closeout, the group may well elect to turn in their report and stop for a period or for good. A group may want to define a new set of objectives, shift members a bit and go on. Make it clear that the old group is done and whatever happens now is a new, and again voluntary, venture.

One approach - many techniques

During the action learning sessions, the facilitator may apply whatever techniques he or she finds helpful to get the group to work through their issues. This is surely the challenge for the facilitator. Chris Argyris' action research, very popular in facilitation circles, is one approach. In the United Kingdom, action learning has been pioneered by Reg Revens, of the Revens Centre for Action Learning and Research at the University of Salford, England. Intervisie is a very popular Dutch approach. Since I assume many of the IAF audience are acquainted with the work of Chris Argyris, I'll just mention a bit about Reg Revens and about intervisie, neither one perhaps so well known in North American.

Reg Revens devised action learning through decades of work in British and European industry, education and government organizations. In discussing a project in which senior Belgian managers switched roles for six months in an action-learning project, Revens notes:

"The senior mangers from one company gave up their job in that company for six months and went and worked as senior manager in another company about which they knew absolutely nothing. They looked at the troubles of some totally different enterprise altogether, and before you can understand what the problems of that different enterprise are, you've obviously got to learn a great deal yourself....So I said to them all, what all I want to ask you is what is the most important question you've learned to ask yourself as a result of this?"[3]

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[3] Reg Revens, quoted in Mike Pedlar, ed.: *Action Learning in Practice*, 3rd edition, Aldershot, Gower, 1997.

Revens is just as concerned that an individual learned something substantial about the profession or work arena, as he is that the individual learned something about himself. These are inextricable in his view.

In the Netherlands, "Intervisie" groups are small working groups comprised of people who do not work together, to explore both organizational and personal matters. The focus of intervisie is for the team to pose open, reflective questions to the problem-bringer. Intervisie enables individuals to get collegial advice on organizational and personal matters from a somewhat "outside" perspective, although not so far outside as Revens' managers. Intervise is widely used in the care-giving professions, for instance in developing nurses, psychiatric caretakers and teachers. In professional development programs for those who deal with very complex problem solving, such as that involving consultants and managers of professionals, intervisie is often used along with case studies and guided discussions as a way of providing "living" case material for evaluation.

Although each of us has preferred techniques that we are personally comfortable with, I suspect that the facilitation art in action learning is the selection of techniques that fit your group. It may come as no surprise that the best way I can recommend to learn Action learning facilitation is to join an action learning set and try it out for yourself.

The Presenter
Maureen Jenkins has designed and led international training programs since 1970. She led or helped lead participative consultations in 8 projects in 5 countries. She was project director or assistant project director involving 1 to 2 year on-site residences in 3 communities. She has designed curriculum for KPN (Royal Dutch) Telecom, Netherlands and The Institute of Cultural Affairs in India, the USA and Europe. She has designed and delivered for KPN numerous management courses for international participants, Training of Trainers courses, Leadership Effectiveness and New Strategies (a medium term planning process), a Human Resource Management diagnostic module and coaching programs for individuals. She is part of the Action Learning Team at Shell Technology Exploration and Production in the Netherlands where she facilitates Away Days and Training of Facilitators Courses. She has also written or edited a number of articles and books on social problems.