

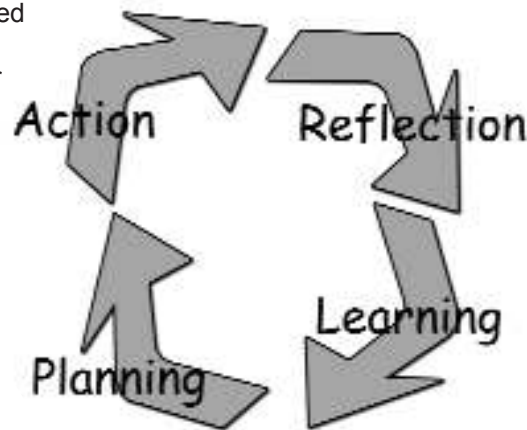


Action Learning Sets

WHAT IS AN ACTION LEARNING SET?

Action learning sets are one approach that can be used to foster learning in the workplace. They have been used by a number of organisations in the NGO sector in recent years. The emphasis is on learning from experience and then acting on that learning. This is shown in the learning cycle (illustrated) which is fundamental to this methodology as an experimental approach to learning.

Simply put, the Action Learning Set approach provides a structured way of working in small groups which can provide the discipline we often need to help us learn from what we do, and improve our practice as a result.



WHAT DOES IT LOOK LIKE?

A typical Action Learning Set will consist of 5 or 6 people who commit to work together over a period of at least six months. The set meets regularly (possibly every six weeks) for a day or half a day. At each meeting, set members have an opportunity to introduce a challenge they are facing in their own practice. The group helps to work on the problem through supportive but challenging questioning - encouraging a deeper understanding of the issues involved, challenging underlying assumptions, and exploring ways forward. As well as reflecting on the issue and developing a plan of action, the set member is encouraged to report back to the group on progress next time they meet, which is a spur to ensuring that action is taken between meetings! The strength of this approach lies in its ground rules and disciplined process; these are outlined on the following page.

WHO IS IT FOR?

Action Learning Sets are best suited for people who are likely to face challenges at work that do not necessarily have a "correct" technical solution. They are particularly appropriate in the development context where the challenge is often complex and multi-layered. In an environment where there is high pressure to take action, the Action Learning Set provides a valuable structure and discipline to ensure that space for learning is protected.

KEY PRINCIPLES

Action Learning Sets provide a disciplined process to help us learn. This page illustrates some of the important disciplines that create the Action Learning Set process...

Committing regular time

One of the main barriers to learning cited by BOND members is lack of time. The development sector is activist in nature and there is often a sense that learning is a luxury. The Action Learning Set process is about making our actions more effective. In order for it to work, there needs to be a commitment to ring-fence time for the process and prioritise it.

Learning to listen

Many people claim to be good listeners, but to listen well takes real skill and is rarely practised. One of the things that participants in Action Learning Sets consistently say they gain from the process is a better ability to listen to what someone is saying before formulating a response.

Learning to ask helpful questions

Action Learning encourages a particular type and use of questions - questions that develop dialogue and reflection, rather than argument and recommendation. The questioning helps clarify and deepen understanding of the problem. It may help challenge assumptions and perspectives held by the presenter.



It's like going to the gym!...

Action Learning Sets can be seen as the mental equivalent of going to the gym to get physically fit. They exercise our "learning muscles" in a structured, safe and enjoyable environment.

Not giving advice

Someone once said "Advice is profoundly pleasurable to the giver!" One of the disciplines of the Action Learning Set is to learn not to offer advice in response to a dilemma, nor to judge what is being said, but to frame helpful questions that will enable the presenter to come to their own solution. One of the roles of the facilitator is to guard against advice packaged as a question, such as "Wouldn't it be a good idea if you....?!"

Following the Action Learning Cycle

The Action Learning Cycle follows the process of: Reflecting, Learning, Planning, Action, then back to Reflecting etc. This provides a useful framework to guide the type, sequencing and pacing of questions. Thus questions are likely to follow a flow - from clarification of the experience and issue being expressed, through reflection and then deeper analysis of that issue - looking at it from different angles and possibly re-framing the original problem. The final questions of the set focus on future action. The facilitator will support the group with this flow of questioning around the cycle. Following this cycle ensures that participants avoid the common pitfall of jumping from problem to solution without investigation of the underlying causes.

Giving individual airtime

Having an hour during which all attention is focused on you and the issue you are bringing to the set might seem like a daunting prospect! In fact, set members report how empowering this experience is - and how rare, since our normal patterns of discussion take us in different directions, shifting focus, and rarely giving support to an individual for such a sustained period.

HOW DO YOU DO IT?

A significant aspect of the Action Learning Set process is the “unlearning” of our common habits of jumping from problem to solution and offering advice. Instead, it adheres to a disciplined methodology centred around good listening and questioning. It is the facilitator’s role to achieve this and create an environment of trust.

The role of the facilitator includes

- Creating a “safe space” for honest discussion.
- Reminding set members of the methodology - ensuring the disciplined process is kept.
- Modelling helpful questioning.
- Ensuring that the questioning moves around the action learning cycle at an appropriate pace.
- Drawing attention to issues of process.
- Being conscious of time.

It is possible for Action Learning Sets to become self-facilitating, but this should only be done once the participants are experienced in the methodology. See the inset box for an example of how one organisation developed self-facilitating sets.

A typical Set meeting might run like this:

- Before the meeting, each member will think about the work-based issues that they wish to bring to the set.
- Members agree to set aside the necessary time for the meeting. It should be held in a space where they will be free from distraction.
- The facilitator might remind set members of groundrules that were established during the formation of the set, and may re-cap some of the key principles of the methodology if required.

Action Learning in Practice

Traidcraft Exchange held a series of workshops for the international department to consider the nature of partnership and capacity building. Action Learning was considered as a potential methodology for developing a more reflective practice based on learning.

The organisation began by holding a “Have a go” session. At this, some participants felt the methodology had great potential and decided to try it out over a longer period of time. Four months later that group reported back to the rest of the department that the pilot had been of great benefit.

Traidcraft then planned a phase of Action Learning Sets, in which two sets met over a period of nine months. As part of this process, four participants were trained as internal set facilitators, so that the groups could become self-facilitating.

An internal review showed the programme was successful (see page 7 for participants’ comments), so it was rolled out to create four sets using internal facilitators. These included participants from different departments. It had taken three years for the programme to develop since the initial exploratory workshops.

- There will be a check-in with the group, and those who had an opportunity to explore their issue in the previous set will be asked to report back to the rest of the set on their actions since the last meeting.

- One of the members will then have an opportunity to have their “airtime”, which is usually an hour. This begins with them

taking 5-10 uninterrupted minutes to outline the work-based issue that they are bringing to the group. The other set members will then ask questions of clarification, moving into reflective and analytical questions and towards the end of the time, questions about future action.

- During this process, the facilitator may sometimes “stop” the set, in order to raise awareness on matters of process, eg if people are giving advice packaged as questions.

- At the end of the airtime, the person presenting their issue will feedback on how they experienced the process and what learning may have taken place. Group members also comment on their observations and learning on both the process and content.

- This process of airtime will be repeated for as many members of the set as is possible in the time available. (Normally two in a half-day, or four in a full-day meeting).

- The meeting may be concluded with the completion of an action review sheet which aims to capture key learning points and action plans from the meeting. The logistical details of the next meeting will also be agreed.

WHAT ARE THE BENEFITS?

Participants have quoted many benefits which they have gained from action learning:

(Weinstein, 1995)

- Learning a more 'disciplined' way of working;
- Learning to network;
- Learning to relate to, and communicate with, others more effectively;
- Gaining increased self-confidence;
- Gaining increased awareness;
- Gaining increased readiness to take responsibility and initiative.

Beyond this, many of the disciplines and behaviours that are seen to characterise a learning organisation are within Action Learning Sets: team learning, dialogue, suspending assumptions, personal mastery (Senge 1992), taking risks, converting mistakes into learning, asking questions, building in time for reflection (Honey 1994). Action learning can be seen as a step toward promoting organisational learning - although these behaviours are not enough on their own.

For organisations to really feel the benefit of action learning, there needs to be the will to support participation in Sets and respect for their outcomes. There needs to be a supportive learning culture, and structures and systems that give space for Action Learning Sets to have an impact on practice.

Levels of Learning

The Action Learning Set enables learning to take place on a number of levels:

- Learning about the wider organisation of which you are a part.
- Learning about group processes.
- Learning about the issue being presented.
- Learning about yourself, the way you work and interact with issues and people.
- Learning how to learn.

"My first experience of an Action Learning Set was a real eye-opener. I thought I had a good grasp of what went on within our department, of the issues that individuals faced and a sense that we were in a state of "dynamic equilibrium" - lots on the go, but all safely in hand. The set woke me up, first to the reality that others were struggling in ways that I had not imagined and secondly to the fact that as a member of the Set I could learn to constructively support my colleagues as they analysed their issues and shaped solutions."

Participant in in-house Action Learning Set.



GUIDELINES FOR AN EFFECTIVE SET

Step by Step

- Take responsibility for your own learning and actions.
- Collaborate with others in their learning but don't try to take it over for them.
- Avoid extraction or using someone's case to solve your own.
- Listen actively and respectfully - if you find it difficult to follow someone, tell them.
- Be honest with yourself, and with others. Be open as appropriate.
- The detail of what happens in the set is confidential. However, general decisions may need to be communicated outside.
- Speak for yourself and avoid generalising.
- Everyone has the right to "Airtime".
- Everyone has the right to not answer a question if it seems right to them not to.
- The set facilitator will also abide by the same guidelines. S/he is not there to prop the set up or take decisions for it.
- Commitment to the process: to time, self-awareness, the set and members, and to action!

"Action learning is an approach to the development of people in organisations which takes the task as the vehicle for learning. It is based on the premise that there is no learning without action and no sober and deliberate action without learning. On the whole our education system has not been based upon this principle. The method has been pioneered in work organisations and has three main components: people who accept responsibility for taking action on a particular issue; problems, or the task that people set themselves; and a set of six or so colleagues who support and challenge each other to make progress on problems. Action learning implies both self-development and organisation development." Mike Pedler (1991)

Liz Goold, 2003
Organisational Change Consultant

Honesty, Respect & Responsibility

For an Action Learning Set to work effectively, set members have to subscribe to, and work with, some basic principles and values. Three key values are:

- Being honest with oneself and others.
- Respecting others and their viewpoint.
- Taking responsibility for our own actions and paradigms.

Honesty with ourselves is key to our own potential for learning. If we are not self aware and honest about our actions, assumptions and mistakes, then our capacity for learning is limited, and our view of problems will always be distorted.

Being honest with others, while respecting them and their viewpoints, is an essential precondition for building trust and openness in an Action Learning Set. Without these values operating the group cannot learn effectively.

Taking responsibility for our own actions, both in work in the set, and in the practice that we bring to the group is part of being honest and self-aware, and is crucial for understanding our own role in 'problems' and our possible ways forward.

WHAT'S THE ISSUE?



A regular question asked about Action Learning Sets is: "What sort of issue should I bring to the set?". Action Learning Sets are not the most useful mechanism for some issues. If the task that a set member is working on is a technical puzzle that basically has a limited number of "correct solutions", then it will be better to tackle that kind of issue through training, speaking to experts, or research in order to uncover and understand that solution more fully. The kind of issue which lends itself to Action Learning Set work is problem based - where there is no clear "right answer" and there are many ways which could be followed from the present

position. Issues may be complex, multi-faceted and interlinked across functions or disciplines. It may even be that in getting frustrated with a blockage in moving a project forward, part of the issue is not being quite clear what the issue is! In addition to this, the issue should be:

- Both work related, and something which is affecting you personally.
- Something for which you have some level of responsibility.
- Something that you are able to influence.
- Something that is realistic to make progress on within the time scale of the Set programme.

NEXT STEPS

It may be that the most appropriate next step for your organisation is to find out more about this approach before taking it further. BOND offers an introductory workshop which looks at the topics introduced in this guidance note in more detail, as well as enabling you to take part in a simulation of an Action Learning Set in order to see how it feels in practice.

Or you may wish to join individuals from other organisations in a set. BOND facilitates sets which bring together participants from a variety of international NGOs, and participants report that they value the diverse viewpoints and networking opportunities that this brings. See www.bond.org.uk/ite/als for details, or contact the BOND Organisational Learning and Development Officer on 020 7520 0244.

Alternatively, you may wish to consider setting up an Action Learning Set programme within your organisation. If so, you should consider the following:



- **Make sure there's some energy**

This process requires commitment, so you will need a core of people who have bought into the concept and are excited to try it in practice.

- **Engage the support of senior managers/trustees**

The process will require time and resources, so it is important that there is someone to champion the cause at a senior level.

- **Explain the concept clearly**

People need to understand how an Action Learning Set works and what will be involved before they agree to it. Often the easiest way to explain is to enable people to “have a go” as a one-off.

- **Be clear about the objectives**

It will assist the programme if both senior managers/trustees and those taking part are clear about what the objectives are for the programme.

- **Decide on selection criteria**

It is important that taking part in the sets is voluntary, but will there be any criteria on those to whom the offer is made?

- **Form sets**

This can be a tricky process, as it is important to get the right balance - for example, in terms of gender, teams or departments. There should usually be no line management responsibilities within a set. Ideally, an internal set will be made up of peers at the same or similar level.

- **Contract a facilitator**

New sets need the skills of an experienced facilitator. If this is not available internally, then they should be contracted. You could also consider training up internal facilitators for future sets.

- **Set dates for meetings and workshops**

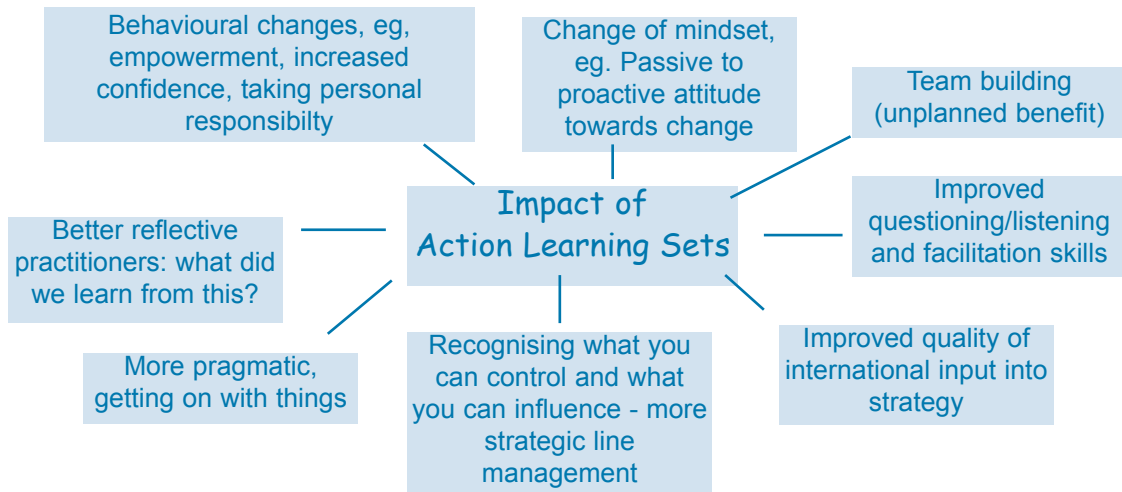
This logistical task can be one of the trickiest in organisations where many staff are travelling. Each group will need to decide if it wants to set dates for all meetings in advance, or if it will set dates one or two meetings at a time. It can also be useful to run a series of workshops alongside the set meetings. A workshop at the start can be used to ensure set members understand the methodology; at the mid-point to focus on issues arising from the sets; and at the end-point a workshop can help to evaluate the programme and decide on future action.

- **Evaluate**

Whether through a workshop or other means, it should be clear how the programme will be evaluated, who will be involved and how the results and future actions will be communicated more widely.

ACTION LEARNING IN PRACTICE: THE BENEFITS

A programme of two Action Learning Sets in the International department of Traidcraft Exchange was reviewed after nine months following the first six meetings and recorded the following comments on their impact:



A review of the BOND pilot initiative of two cross-organisational Action Learning Sets for people working on Organisational Learning provided positive feedback from all participants. Here are some of their quotes:

"I've learnt ways of asking questions and coaching skills. It's broadened my perception of knowledge management to encompass organisational learning. It has reinforced the need for me to stand back and reflect."

"[My organisation] has made strong statements of being a Learning Organisation. I have always known the intention was there, but now am able to identify some gaps in the thinking about how we achieve that."

"[The most useful things have been:] Alternative angles on my professional challenges. Increased understanding of change theories and complex systems environment. Reassurance from knowing that others are facing similar challenges."

WHAT'S THE HISTORY?

" Responsible action is, in itself, an effective learning process."

Professor Reg Revans,
the originator of the
"Action Learning Set"

(1907-2003)

The concept of Action Learning Sets was developed by Professor Reg Revans, whilst Director of Staff Training and Development at the National Coal Board during the 1940s.

Since that time, Action Learning Sets have developed worldwide as a methodology to link learning and action

in both public and private sectors - in industry, academia, the health service and voluntary organisations. Recent years have seen the Action Learning Set methodology being used increasingly within the NGO sector as a way to improve development practice.

In 2002, BOND began a programme of inter-organisational Action Learning Sets to promote work based learning within the development sector. The Action Learning work forms part of the BOND programme on Organisational Learning and Development.

Information about the BOND Organisational Learning and Development programme can be found on www.bond.org.uk/lte/ol.htm

FURTHER RESOURCES

This guidance note, and a range of supporting information relating to Action Learning Sets in the International Development arena can be found on the BOND website at: www.bond.org.uk/lte/als.htm

www.revansinstitute.co.uk - The Revans Institute of Action Learning and Research was established in 1995 and is part of the University of Salford, Manchester.

www.ifal.org.uk - The International Foundation for Action Learning. This is the UK branch of this organisation which also has links to material on it's American and Canadian sites.

www.cambridge-online-learning.co.uk/download/action_learning.doc - A useful introduction to the theory of Action Learning.

www.wendwell.co.uk/coach2.htm - A useful document that gives some thoughts on setting up an Action Learning Set for those who already have some experience of the methodology.

FURTHER READING

Honey, P. (1994). Establishing a Learning Regime, Organisations and People. Vol 1, no 1.

McGill, I., Beaty, L. (1995). Action Learning, A Guide for Professional, Management & Educational Development (2nd ed), Kogan Page.

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Pedler, M. (1997). Action Learning in Practice, Gower Publications.

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Senge, P. (1992) The Fifth Discipline. Century Business.

Weinstein, K. (1995). Action Learning, A Journey in Discovery & Development, Harper Collins.

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ABOUT BOND



BOND is the network of over 280 UK-based non-governmental organisations (NGOs) working in international development and development education.

BOND aims to improve the extent and quality of the UK and Europe's contribution to international development, the eradication of global poverty and the upholding of human rights.

The Guidance Notes Series aims to provide 'how-to' information on a variety of topics for the development sector. This edition also provides signposts to resources for those keen to pursue the topic further.

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