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Action learning

An extract from Cropper, B., Dick, B., Donaldson, B., and Patty, C. (2002) *Learning from action*. Brisbane, Qld.: Department of Families.

Learning from action is a training manual prepared as part of an action learning program for Department of Families, Queensland. I prepared the first drafts of these segments (2 and 3) on action learning, for consolidation into the overall training manual. Those first drafts are reproduced below. Other segments (not reproduced here) were written by Bill Cropper and Brian Donaldson, who also contributed minor pieces to the present segments.

Some diagrams, graphics and cross-references from the original document have been omitted.

Segment 2: action learning principles and practice

What is Segment 2 about? — Learning from experience

We all learn from experience.

Think back, if you can, to your childhood years. Consider all of the things you can do now that you couldn't do then. Many of them weren't taught. You picked them up naturally. Your early attempts at walking were almost certainly clumsy. In time you learned to walk easily and without thought.

There were other skills you were deliberately taught to some extent. Language is an example. Parents and others correct the young child's speech. But even there experience was important. After some initial coaching from others, your language continued to improve without much conscious attention from you.

In other words, people learn naturally. These natural skills can be drawn on to learn at work. By augmenting them with other maps and processes you can further enhance them.

This segment will help you build on what you already know. Action learning is a natural process. Your early reaction may well be "I do that already". In this segment you will become more conscious of what you already know.

Not all learning is efficient or effective. You will know from your own experience that some problems continue to be problems. Building on your existing understanding, this segment will help you improve your learning. In particular, it will help you

- make better use of planning and reflection
- improve your ability to learn by yourself
- learn in the company of others, and
- help others learn.

Activity: Learning from experience

? How do you learn from experience? Think of some situation where you learned something important — something you still make use of.

(For instance, it may be some aspect of communication, or management, or some technical skill which you do well.)

What was it you learned from that experience?

What was it about the event that made it a good learning experience?

What did you do that helped? In particular, what did you do before ...?

.. and during ...?

and after the event that helped with your learning?

Looking back on that learning event, what else do you now think you could have done to make your learning even more effective?

In what follows, we'll explore together some of the features of action learning that build upon your natural ways of learning. As we do so, keep this piece of learning in your mind. Check out what we say, to find out how well it applies to you.

Action learning — how would you recognise it?

> Action learning describes an educational strategy, used in a group setting, that seeks to generate learning from human interaction arising from engagement in the solution of real-time (not simulated) work problems. Joe Raelin, *Work-based Learning* (Prentice Hall, Upper Saddle, NJ, 2000, p 66).

A small team of people are gathered around a table, sometimes facing a whiteboard, sometimes facing each other. They seem very intense on what they are doing. You notice a number of things ...

- The overall atmosphere is "tasky", and people engage in their task with energy and enjoyment. It is clear that they enjoy working together
- There is something systematic about the way they work, yet there seems also to be some flexibility about it
- The variation in dress suggests to you that they may be from different organisations, or perhaps from different parts of the same organisation
- As they work, they capture their conclusions and decision on the whiteboard or on butcher paper
- They ask questions of each other, and often challenge each other, with the person questioned or challenged responding without becoming defensive or upset
- It almost seems that they invite different opinions in their discussion; when differences arise they seem to be using them constructively to make better decisions
- They seem unafraid to admit that they were mistaken, or that they do not understand something
- From time to time it seems that one of them does more of the questioning, though most of them do the same at least occasionally

Your overall impression is that they work cooperatively and with obvious purpose, that they base their decisions on evidence. Much of what they do might be regarded as planning. But they also sometimes critique how they are working together.

Whatever they are doing, they seem to be doing it well and with enjoyment.

Perhaps it is an action learning team. Perhaps in this role they are working together to solve some problem — it may be a shared problem, or a problem or task that one of them has brought to the team.

But what is action learning?

> Action learning is cradled in the very task itself, asking whether that task can be done so that, merely by reflecting upon how it currently seems to be done, the very doing of it supplies the learning generally offered far from the scenes of managerial activity. Reg Revans, *ABC of action learning* (Lemon & Crane, London, 1998), p5.

Action learning is a style of learning which leads to very practical knowledge and skills. It builds understanding as it builds a capacity to act more effectively. Some of its features are described below.

? How many of the following applied to the learning situation you have just analysed?

Change oriented? — you were trying to improve or change some aspect of the situation
Mindful? — You paid attention to what happened. You thought about it in some depth later
Cyclic? — You acted on it afterwards. You continued to apply and learn from it
Qualitative? — You thought about your learning in words and symbols more than (or as well as) in numbers
Participative? — It happened in the company of (and perhaps with the assistance of) others

Change oriented. Action learning is intended to be applied. The understanding which emerges from it can be immediately used in action. That action can further develop the learning.

Mindful. Much of what we learn, however, remains tacit. We are therefore less able to notice how it works, or what we might do differently. When we plan before action, observe during action, and reflect critically after action, we learn faster.

Cyclic. Learning and action supplement one another in an ongoing cycle: action → learning → action ...

Qualitative. Language is the natural vehicle in which this learning is recorded, supplemented by maps and models. However, language is used in ways which are rigorous.

Participative. It is participative in two respects. It mostly takes place in the company of others. The action typically seeks to involve all those affected by the action in the planning, action and review.

These characteristics are expanded below. There you will also find an opportunity to reflect further on these characteristics of action learning.

Distinguishing features of action learning

Action learning is….

Your reactions? Ideas on steps etc…

1. **Change oriented** — Action learning is embedded in action. It seems to accomplish some worthwhile task. It is intended to bring about some improvement in the situation or implement some worthwhile initiative. In action learning, the action and the learning are integrated. They are not separated as they are

in some formal education. As participants introduce change, they learn.

2. **Mindful**: Action learners are thoughtful and observant. Action learning is critically reflective, in the moment of action as well as before and after. Action learners act with intention, pay attention to what happens, and analyse their actions and the consequences later. Mindfulness and critical reflection are important features of action learning, improving both the action and the learning.

3. **Cyclic**: "…a spiral of cycles of planning, action (implementing plans), observing (systematically), reflecting…and then re-planning, further implementation, observing and reflecting…[It] starts with small cycles of planning, acting, observing and reflecting which can help to define issues, ideas and assumptions more clearly so that those involved can define more powerful questions for themselves as their work progresses" McTaggart in Goff, (1998).

4. **Qualitative**: Language is the natural medium of conversation. Action learning therefore makes use of natural language, though with more than usual attention to rigour. Within an action learning program, understanding develops through informed and evidence-based discussion. The form of language is supportive and at the same time questioning. (Quantitative methods may also be used, but qualitative approaches predominate.)

5. **Participative** — The intended result is real-time change and improvement. Action learning therefore relies on the participation and commitment of those affected by it. Organisational learners are actively involved in the process, although the extent of participation may vary. Greater participation can certainly yield richer and more comprehensive information, and more commitment to the action.

We will have more to say about these later in this segment and throughout this Guide. First, however, we will explore these from the perspective of individual learning, on which team and organisational learning depends.

Action learning is change oriented — embedded in action

> It is not enough to know what is good; you must be able to do it. George Bernard Shaw, *Back to Methuselah*, Act IV Scene 1.

Rick Ross and his colleagues (in *The fifth discipline fieldbook*, Doubleday, New York, 1994) define knowledge as "the capacity for effective action". Reg Revans, the founder of action learning, distinguishes between two forms of learning:

- programmed knowledge, **P**, which is the learning of "facts", and
- the learning which arises from questioning inquiry, **Q**, embedded in action.

He combines them in his well known formula **L = P + Q**. Learning consists of programmed knowledge and the learning that results from questioning inquiry.

While not dismissing **P**, he does point out that it is learning for and from the past. It is **Q**, perhaps supplemented by **P**, which best fits an unexpected present.

He developed this approach in the 1970s, when the pace of change was less than it is now. In these times of rapid change, it is likely that his approach is even more useful.

? Think about the learning which you use to do your job? How much of it was learned in your formal schooling or through formal tuition? How much was learning applied from earlier experience? How much was learned by doing the job?

	P%	**Q%**
Schooling, formal tuition, reading?		
Learning applied from earlier experience?		
Learned by doing the job?		

? For that matter, think about the skills and understanding you had when you first began work, and how much you have now.

In the light of this, what is your reaction to the views of Revans?

Write down your ideas here ...

Of course, different people have somewhat different learning styles, as we shall see ...

Action learning is mindful — it uses critical reflection to make the learning explicit

> Experience merely provides raw data, which is a source of learning but is not the learning itself. ... [L]earning results only after managers attribute meaning to an experience, that is, after they understand the raw data of the experience. Kent W. Seibert and Marilyn W. Daudelin, *The role of reflection in managerial learning* (Westport, Quorum, 1999, p xvi), reporting on the results of their research into managerial learning.

As we mentioned above, learning which comes from experience is often tacit learning. Critical reflection makes the learning explicit.

Don Schön uses the example almost all of you will be able to relate to:

> *"If you are riding a bicycle, and you begin to fall to the left, then in order not to fall you must turn your wheel to the ___? Quick! I'm about to fall!*
>
> *"How many think 'right'?*
>
> *"How many think 'left'?*
>
> *"How many don't know?*
>
> *"How many think this is an irrelevant question?"*

? Quickly, what do you think?

The point he is making is that we all have no difficulty doing this. It is consciously knowing how we do it that is the problem. For some skills — like riding a bicycle — it is better if we don't think about it too much. Overlearned motor skills are best left to our unconscious. Other more complex skills, of greater scope, can be a different matter. Unless we have some conscious knowledge of what we know we may find it difficult to ...

? What do you think? What are the disadvantages of knowledge which is only tacit?

Here's a space to write down your thoughts about the disadvantages of tacit learning

The disadvantages include that we may find it more difficult to:

- change our behaviour when it doesn't work
- help others learn the skill.

Let's examine in more detail how we may improve our critical reflection, and thus our learning.

Case study: Mechanisms for critical reflection

This material is drawn from a university class set up as a number of action learning teams. In all, an evaluation of the class revealed about 20 processes and activities which encouraged reflection. Here are some of them which may be suitable for action learning teams in other settings

- Class members were encouraged to keep diaries. In these, they noted down "critical incidents", what they learned from them, and what use they intended to make of their learning

- Class members were organised for the whole year into "home groups" of about 5 or 6 people. Each of these functioned as an action learning team. Some time each class was set aside for people to meet in these teams
- Near the end of each class, half an hour was spent recollecting the day's events and reviewing the implications
- Following the half hour review, people met briefly in pairs. Their task was to recollect the day's events, choose what they would write in their diary, and identify any dissatisfactions with the class process. The same pair met at the start of the next class session. They reminded each other of what happened the previous week. This was then used to initiate a process review
- All class activities, all assignments and the like were preceded by a plan and followed by a self-evaluation and a statement of what they learned from the activity
- The last day of each semester was devoted to a review of the semester, and collected suggestions for future change. The evaluation at the end of first semester fed into class planning for second semester. The results of the end of year evaluation were incorporated into the "standard package" and reported to the next year's class
- Every two or three weeks, small groups of class members met with relevant local practitioners. The practitioners helped them to understand how class activities related to practice.

In these few examples, note the use of

- individual, small group and whole group evaluation
- regular evaluation over a number of different time spans
- both individual and interactive forms of reflection
- encouragement to document learning and think about its application

? Which of these would suit your learning style? Which others might you be able to use for your own learning?

Here's a space to write down your thoughts ...

Action learning is cyclic

When we explain the learning cycle to many practitioners they reply ...

"Oh, I already do that"

And in a sense, they do. As we've already seen, we learn much from our experience.

When they learn to reflect more often, more regularly, more systematically, and especially more critically, their learning and their practice improves.

Case study: the CADCAM system

Julie (let's call her) was a design engineer in a company specialising in the manufacture of custom built machinery manufacture. Her CEO purchased at substantial cost a CADCAM (computer aided design and manufacturing) system.

It functioned well during the trials. When it took on a full workload it was far less effective. However, no one wished the CEO to lose face. The poor performance of the CADCAM system became undiscussable.

Julie was enrolled for a PhD using action learning. [1] She also managed a section which depended heavily on the CADCAM system. She decided to make the system the topic of her PhD. At first she concentrated on her own use of the system and how she might improve that. Having done this she involved her own team in regular sessions of analysis and critical reflection. She and her team were able to work out better ways of using the system, and also introduce some changes to it.

When she had gone as far as she could within her own team Julie gradually extended the use of action learning to adjacent teams, and then further afield. Eventually the CADCAM system worked well. Julie improved her own managerial skills, especially her people skills. She saved substantial amounts of money for her organisation. She completed a successful PhD. Without her initiative (and her use of action learning) it is possible that the CADCAM system would still be inefficient.

The action learning cycle

At its simplest, action learning alternates doing, and critical reflection. The doing achieves the outcomes. The critical reflection allows the doing to be more intelligent, and the learning from experience to be more conscious and more useful.

Critical reflection, as you will see, has several components which help to make it more effective.

1. And action research. We'll come to that later.

The components of critical reflection

Reflection is used to look back, and to look forward. It is used to examine what happened during the doing, and then to use this to work out what to do next. In between these two elements, you build theory — conscious understanding — from the experience:

- What happened?
- What have I learned from that?
- How will I make use of what I have learned?

There are many versions of this. The elements tend to be the same. The language is different. Outdoor education people use this too, with different questions:

- What? — that is, what happened?
- So what? — that is, what does it mean, what is its significance?
- Now what? — that is, what are the implications for action?

In the language of Peter Senge and his colleagues ("the wheel of learning" in the *Fifth discipline fieldbook*, p 60) the elements are named reflecting, connecting and deciding. [2]

Doing. Carrying out some action. As we can start anywhere in the cycle, this is usually a set of actions planned during a previous "deciding" element

Reflecting. Noting what happened. Senge and his colleagues (Fifth Discipline Fieldbook, p 60) offer the following questions:

2. To maintain agreement with some early Department of Families documentation, this is the terminology used here. I would otherwise have used different terminology.

- How well did it go?
- What were we feeling and thinking during the process?
- What underlying beliefs (what "theories in use" [3]) seemed to affect the way we handled it?
- Do we see our goals differently now?

As the Fieldbook points out, many people treat reflection as "doing nothing". In fact, it is doing something very important for the person and for their organisation. Unless the actions and their results are recalled in sufficient detail, and critiqued, the value of the following stages is reduced.

Connecting. Other models call this "theorising" or "generalising". Having made sense of the experience, we seek to capture our understanding as a statement or a map or model. We look for patterns and similarities with other behaviour. The quality of this depends on the quality of the reflection which precedes it.

Deciding. Often called "planning", this is the stage which turns the previous understanding into intentional action.

This is the "individual" version of the learning cycle. We'll revisit this below when we consider team learning. Next, two tools useful for improving critical reflection.

3. The term is Argyris's. A later section refers to the form of theory Argyris suggests.

Activity: The stages of the individual learning cycle

Choose some recent activity which was relatively short in duration, but you found challenging. It may have been a difficult interaction with a colleague, for instance. Use the following questions to practise following the stages of the individual learning cycle. In this instance the **doing** has already taken place. We'll begin with the reflection.

? **Reflecting**. Exactly what happened? What did you (and the other people present) do? Use the "Fifth Discipline Fieldbook" questions:

How well did it go?

What were you feeling and thinking during the process?

What underlying beliefs (what "theories in use") seemed to affect the way you handled it?

Do you see your goals differently now?

? **Connecting**. Looking back over your recollections, what sense do you now make of the situation? What actions on your part seemed to produce what outcomes?

ACTIONS OUTCOMES REASONS for OUTCOMES

? **Deciding**. Now look ahead to the next time you are faced with a similar situation. What will you try to achieve, and how will you try to achieve it?

WHAT WILL YOU TRY TO ACHIEVE? HOW WILL YOU TRY TO ACHIEVE IT?

Action learning is qualitative but rigorous

As mentioned, the natural medium of learning is often language.
Some of your colleagues may be sceptical of such approaches ...

("If you can't measure it, it doesn't exist.")

Action learning, especially when combined with action research, can be both flexible and rigorous.Part of the rigour comes from the critical reflection already discussed. The cyclic process, alternating action with critical reflection, allows the flexibility to deal with real work in real time. At the same time, by following reflection with action, it allows that reflection to be tested in action.

The more critical, systematic and regular the reflection, the truer this is.

There are other sources of rigour. Two important sources are:

- Making assumptions explicit so that they can more easily be tested
- Framing theories in a form that leads easily to action and test.

We'll now examine two tools which help to achieve this. (Later we'll examine other ways of increasing quality.)

Tool: Theory of action

> It is uncommon for professionals to test their theories or to benefit from whatever degree of testing does occur; that is, professionals often function without considering what they have learned from previous situations. Chris Argyris and Don Schön, *Theory in practice* (Jossey-Bass, San Francisco, 1974, p 144).

The work of Argyris and Schön is evident through Senge's work on the fifth discipline. One of their many contributions is to suggest a form of theory which is well suited to action.

As described in *Theory in practice* (p 9) it takes the following form:

> "In situation S, if you intend consequence C, do A, given assumptions a_1 ... a_n"

This form of theory translates easily into action. In the connection stage of your reflection you can identify the patterns in what you did and observed. Then, when you are deciding what to do next, you can use questions (as follow) to devise a theory of action during the deciding stage.

These follow.

Tool: Reflective questions

These questions are at their most valuable when they are used before taking action. Facilitators/coaches and their teams can use this tool ...

- for developing better understanding of a situation, and
- as questions to improve reflection.

1a **Situation**. As far as you can tell, what seem to be the most important features of the situation you face?

1b Why? What leads you to think that those are the most important features of the situation?

2a **Consequence**. If you are right about the situation, what do you think would be the desirable outcomes to try to achieve (for you and others?

2b Why do you think those are desirable outcomes in that situation?

3a **Actions**. What actions do you think you can carry out to achieve those outcomes in that situation, assuming you are correct?

3b Why do you think those actions will give you those outcomes in that situation?

The questions about situation, outcomes and actions provide the first three elements of Argyris and Schön's theory of action. The "why" questions help you surface the assumptions underlying your answers. This is the fourth element. Having made your assumptions explicit you are more likely to notice (during action and the following reflection) if those assumptions are incorrect.

? Use the space below the questions above to revisit the challenging situation you analysed above.

? If you were faced with the same situation again, what would your answers to the six questions be? (It will aid later reflection if you make a written note of this.)

Improving the quality of action learning

Action learning is a natural process. Being rigorous, it seems, is not. Here are some ideas for improving the quality of action learning, and some space to add your own ideas. Notice how the action learning cycle builds quality into your understanding and your plans.

SOME IDEAS FOR IMPROVING QUALITY	YOUR IDEAS FOR MAKING USE OF THESE
Use multiple cycles, so that in later cycles you can test the results of the earlier ones. In each cycle include all the elements.	
Make sense of each experience, and apply your understanding first in planning then in action. Your evidence, interpretation and plans are then all tested in action	
Don't just settle for the first interpretation which comes to mind. Check that it does make sense of the experience	
Seek different views. Test your own views against them	
Compare your current experience to previous experience	
Use several methods to collect information. Each method can then act as a quality check for the others	

Monitor how well your planned changes work in practice. Each change is a test of the assumptions and plans that led to it

Above all, look for evidence which challenges your ideas. Pay attention to evidence which disturbs you or raises your anger

Use the literature as a further source of discon-firming evidence

You may have some thoughts about other ways of improving quality. If so, write them below

YOUR SUGGESTIONS FOR QUALITY	WAYS OF APPLYING THEM

When we come to consider the cycle as it applies to learning teams, notice how much the team environment strengthens many of these.

Action learning is participative

So far we've been talking as if action learning is an individual activity. Of course, the action learning cycle can be used for individual learning.

In reality, action learning almost always happens in company. For most of the rest of this segment we'll be talking about action learning as practised by a group of people.

There are two common forms of action learning:

1. As developed by Reg Revans it consisted of different people (usually CEOs) from different organisations. In this classical form each participant brought a different issue to the group, and often took away different learning. Facilitated in the early stages, the group often became self-facilitated.
2. Today, most action learning occurs within a single organisation. A group of people are assembled around a single project of some form. There is more overlap in their learning. They may be an ad hoc team assembled for the purpose or an intact work team dealing with some aspect of their normal work. In most applications each team (often known as a "learning set") has a facilitator (often known as a "set advisor").

The action learning teams being used as a strategy in The Future Direction Initiatives [4] bear some resemblance to each of these. In any event, the same cyclic and reflective process is used by each. The similarities outweigh the differences.

The team learning cycle

For each element of the individual learning cycle there is a team equivalent. We can use Senge's terminology:

The cycle can begin at any point: for example, starting with public reflection ...

4. A program within Department of Families.

Reflection. The action learning team reflects publicly on the past experiences relevant to their current task.

From this they develop **shared meaning**, a shared understanding of the meaning of the experience.

The shared meaning is then applied to develop **joint planning**.

This in turn forms the basis for further **coordinated action** and the beginning of another cycle.

As you will have found above, different people tend to favour different elements of this process. Action learning teams are more effective when they give attention to all four elements in turn, and draw on the talents and preferences of all their members.

The learning cycle in action learning teams

What's your experience of groups?

We expect you spend a lot of your time in meetings of one type or another. How well do they work?

("Groups? Ugh!!")

Perhaps we should look at some ways of getting them to work better.

Think of some recent groups and meetings you have been involved with. When they were most effective, what helped? When they were least effective, what got in the way?

? What were some things that helped?

? What were some things that got in the way

Remember these. In the next few pages we'll explore some ways of making work in action learning teams more effective and more enjoyable. You can use your own experience to evaluate our suggestions.

Working effectively in action learning teams

> ... the distinctions drawn by academics between research, action, learning and communication are highly artificial, if not knowingly misconceived. Reg Revans, *ABC of action learning* (Lemos and Crane, London, 1998, p 14).

Reg Revans is acknowledged as the creator of action learning. (Of course, he drew also on other ideas that were current at the time, just as we have in this guide.) In the quote immediately above he is saying that research, action, learning and communication fit together. They are part of the same package. Each of them makes a contribution to the outcomes of an action learning team.

Research. Action learning teams make evidence-based decisions. The collect relevant information, analyse it, and use it to make informed decisions. They test their assumptions in action.

Action. Action learning is real work in real time. Action learning teams work on tasks and issues which are important for them and for the organisation and the community. A key purpose of such teams is to implement their decisions for the benefit of their organisations and communities and the people within them.

Learning. Learning derives from experience and is then expressed in action. The learning is achieved by individuals, by action learning teams. At best, it is then also recorded and communicated so that others may also benefit from it.

Communication. Communication is one of the important vehicles through which learning occurs. The style and extent of communication assist learning, and can profoundly influence the enjoyment action learning teams achieve from their work together.

When well-run action learning programs have been evaluated it has been clear that they are a cost-effective way for organisations to solve real issues and develop the important "soft skills" of their managers. Members of action

learning teams almost without exception report that their learning has been effective and enjoyable.

By the way, this isn't only true of action learning teams. Any group of people can make use of the same principles and processes to improve both their learning and their contribution to the organisation or community. In developing their soft skills, their people and communication and problem solving skills, people are addressing one of the three important skill lacks in Australian management identified by the Karpin report "Enterprising Nation" (AGPS, Canberra, 1995.)

> The significant gaps [in management skills in Australia] are in the areas of entrepreneurship, global orientation, soft skills, strategic skills and management development. [...] Australian managers need to improve their teamwork skills, including cooperating with a more diverse workforce and being more prepared to take responsibility for team outcomes." *Enterprising Nation*, pp xv-xvi.

The research in action learning [5]

Each element of the learning cycle provides opportunities to improve understanding and to plan more informed action.

- Reflecting is a time to notice what worked and what didn't, and in particular to notice the assumptions which weren't supported in practice. Reflection is often where the disconfirming evidence is noticed

5. In compiling this guide we have drawn on the substantial action research literature in addition to the literature on action learning.

It is also often a time for collecting other evidence from other people and other sources. More diverse information can yield richer information to work with

- Connecting (developing theories and models) is when tacit understanding is made explicit, and captured in a form which allows it to be retained, and to be communicated to others

  It is also the time when other theories can be drawn on, to make sense of the experience. Sometimes it isn't necessary to reinvent the wheel

- Deciding is not only a time for making plans about who will do what. It is here that ongoing monitoring is also built into the plans. See the tool "Event track" for one way of building the monitoring into the plans

  And sometimes there are other plans and packages against which the current plans can be benchmarked

- Acting is where the assumptions, models and plans are tested in practice

Note that research may mean drawing on resources outside the team.

If the team lacks some skills it makes sense to recruit those skills into the team for the action. An action learning team doesn't have to be self contained. It can import information and assistance whenever that is a useful thing to do.

("Fine. But how do you avoid paralysis by analysis?")

How, indeed. Among other things, by being clear about the nature of the decisions to be made

Tool: Decision types

When it comes to deciding, it helps to know what sort of decision it is. What is the key issue about the decision?

? See if you can think of an example of each ...

TYPE OF DECISION	YOUR EXAMPLE
Is it **time**? Sometimes time is of the essence. It is better to make a poor decision by the deadline than a good decision afterwards	
Is it **quality**? There are some decisions which are so far reaching in their consequences that it is important the decisions are as good as they can be	
Is it **commitment**? Sometimes committed people will make a poor decision work, and uncommitted people will make a good decision fail.	

Of course, many decisions have two or three of these elements. By asking yourself how important each one is, you can assess how much effort to put into timeliness, careful analysis, and building commitment through involvement

Deal with disagreement by being responsive to the evidence ...

Tool: Emergent explanations

This tool is useful for moving from reflection to connection — to build theory from experience. Instead of trying to find an existing theory or model to explain the information compiled during reflection, the action learning team can put pre-conceptions aside and allow themselves to be guided by the evidence.

Working with multiple sources of information or opinions or experience, the steps are as follows

- Look for areas of overlap between the different data sources
- If there is agreement (same topic and same opinion) search out exceptions to the agreement
- If there is disagreement (same topic, different opinions) seek out explanations for the disagreement

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The action in action learning

> What constitutes action? [...] The essence of a project/task is that it must be something that participants can get their teeth into, will find a challenge, want to or are able to resolve, that is important to their organisation, ...Krystyna Weinstein, *Action learning: a practical guide*, second edition (Gower, Brookfield Vt, 1999, p 88).

Without action, it all remains an empty exercise. The action is what brings about the improvements or the innovations which the action learning team is trying to achieve.

Kurt Lewin, regarded as the father of action research (in many ways a close cousin of action learning) is reported to have said that there is nothing so

practical as a good theory. He was saying that mindful action informed by relevant theory is more likely to be effective.

It might also be said that there is nothing so theoretically useful as some good action. It is in acting on our plans and the related assumptions that we find out how good those plans and assumptions are. It is often in trying to change something about an organisation or community that we develop a deeper understanding of how it really works.

Some actions are extended in times. Others are brief ...

Cycles within cycles

The action learning cycles are nested. In any particular action learning program there will be opportunities to apply the cycle across the whole program, with the "action" being the completion. Along the way there will be actions which occupy only minutes or seconds, each with its own reflection, connection and decision. There will be intermediate cycles.

Consider an example. An action learning team takes on the task of setting up better mechanisms for community involvement in decisions.

The overall program is likely to begin with a phase of reflection and study and research. From this, some guiding models and processes will be chosen as a template to guide the overall process. A detailed plan will be developed and then implemented.

In all but very small tasks there will be intermediate stages. These too are likely to follow the same process of reflection, sense making, planning and action.

At any stage during the action learning task, facilitator and team members will monitor their own process. Over the course of minutes or less any one of them

may make an observation, draw interpretations from it, decide what to do about it, and intervene to improve the process.

At all times, actions large and small are guided by plans informed by theories and models, and lead in turn to reflection, analysis and the revision of the models.

The learning in action learning

> [W]e know more than we can tell. [...] We know a person's face, and can recognise it among a thousand, indeed among a million. Yet we usually cannot tell how we recognise a face we know. Michael Polanyi, *The tacit dimension* (Peter Smith, Glocester, Mass., 1983, p4.)

Forms of learning and knowing

We mentioned earlier that Reg Revans describes two varieties of learning. One, **P**, comes from programmed knowledge. The other, **Q**, arises from questioning inquiry. John Heron (*Cooperative inquiry*, Sage, London, 1996, p 33 and elsewhere) identifies four varieties:

- Propositional knowledge – "knowing that" — knowledge of facts, theories, ideas, and the like. This is the form of knowledge which much formal education seeks to develop. For Heron, it also interacts with the three other forms
- Practical knowledge – "knowing how" — knowing how to do something, to "exercise a skill". There is often a tacit component. Riding a bicycle is an example

The two forms of knowledge above are equivalent to Revans' P and Q knowledge. The following two are in some respects more natural, and also harder to

describe to others. Heron's view is that they are the foundation on which propositional and practical knowledge are built.

- Presentational knowledge – knowing that is "built in" — knowing expressed in non-propositional forms, as patterns, images, sounds, movements, metaphors and the like. Much intuitive knowledge is of this form
- Experiential knowledge – this is the knowing that accompanies direct experience and interaction. It includes feelings as well as thought. It is often tacit. Examples include knowing what it is like to be in the company of a certain person, or the "feel" or "atmosphere" of a place.

Heron relates these four forms of knowing to a four-element cycle of research. Experiential knowing accompanies action. It is interpreted intuitively as by presentational knowledge. We can convert it into facts and theories in the form of propositional knowing. We then apply it as practical knowing. The point to be made here is that there is both tacit and explicit knowledge. We can learn more if we both draw on our tacit knowing and deal with it in critical reflection.

Many of the processes we describe in this guide are intended to integrate the theoretical and practical, the tacit and explicit, the inherent and the acquired. It is in the alternation between action and critical reflection, especially in the company of critical and supportive colleagues, that this is often achieved.

In the company of others, communication is important. The style of interaction influences the climate, and the effectiveness, of action learning teams ...

Constructive interaction

A society is a link of relationships between people and institutions, so that we can live together. But it only works if we have a culture — which implies that we share meaning: ie., significance, purpose, and value. Otherwise it falls apart.

> Our society is incoherent, and doesn't do that very well; it hasn't for a long time, if it ever did. The different assumptions that people have are tacitly affecting the whole meaning of what we are doing. David Bohm, physicist, and creator of dialogue, in *On dialogue* (Routledge, London, 1996, pp 19-20).

In the quote above, David Bohm is talking about societal culture. We can also talk about the culture of an organisation, or an action learning team, or a relationship. The culture will do much to determine how people are willing to interact. How they interact will in turn help to maintain the culture.

Activity: three styles of interaction

Imagine that someone makes a statement. You have a different opinion. Which of these responses would you be most likely to say to yourself:

- "That's wrong!"
- "I don't agree. But it's not worth saying so."
- "I believe differently. How can I explain how this person and I came to such different conclusions, and find out what the reality is?"

Behind each of these is a particular mindset, a mental model, which energises the thought. These are what you might say to yourself. You can use a similar categorisation for what you and others say out loud in response to some assertion.

An **adversarial** statement may be an open expression of disagreement. "No, the facts are ...". Or it may be disguised as half-agreement. "Yes, but ..." The underlying mindset might be characterised as win/lose. "There is going to be a winner and a loser to this discussion. If I'm not the winner, I'll be the loser."

A **consensual** statement may focus on something you can agree with. "I agree that ..." Or it may just agree uncritically. "Yes, absolutely." Or it may consist merely of saying nothing and pretending agreement. The underlying mindset may be that conflict is bad and to be avoided. The stance is superficially win/win. There may be an underlying assumption that "if I don't agree it will turn into win/lose".

A **dialectical** statement is likely to be a little more complex. For example: "The evidence I'm familiar with suggests ... It seems you have different evidence. Can you say a bit more?" And of course the tone of voice and body language are important. The underlying mindset is a belief that it's a complex world which different people perceive differently. There is often more than one right answer, and sometimes there aren't any right answers. Diversity is valuable. If we really engage with each other it can be a mutual education.

? Take a moment to consider. Which of these will lead to the most productive outcomes for an action learning team? What can you do to bring it about?

The more practical aspects of these important topics are addressed in the next segment.

Segment 3: action learning in practice

What is segment 3 about? — action learning teams in action

So far we've examined the principles of action learning — its general nature, its purpose, the sorts of outcomes it can achieve. We've looked at the importance of cyclic, iterative processes where action alternates with critical reflection. We've examined some of the sources by which the quality of the information considered, the conclusions reached, and the outcomes can be improved. We've explored in some detail the style of interaction which supports an action learning team and its goals.

In the following pages we examine how this might be done in practice within an action learning team.

As you work through this we encourage you to keep in mind the virtue of ...

- being self-sufficient when you can
- knowing when you can be self-sufficient, and when to ask for help

- being prepared to learning from your experience; it would be a pity if you treated this Guide as something to be rote learned, rather than as something to help you learn from experience.

Personal reflection: A walk through the action learning cycle [6]

> There is a deep learning cycle. Team members develop new skills and capabilities which alter what they can do and understand. As new capabilities develop, so too do new awarenesses and sensibilities. Over time, as people start to see they experience the world differently, new beliefs and assumptions begin to form, which enables further development of skills and capabilities. This deep learning cycle constitutes the essence of the learning organization – the development not just of new capacities, but of fundamental shifts of mind, individually and collectively. The five basic learning disciplines are the means by which this deep cycle of learning is activated. Sustained commitment to the disciplines keeps this cycle going. Peter Senge *The fifth discipline fieldbook* p. 18

Action learning is a natural, instinctive human survival process. We take *action* – or something happens – and we extract *learning* from it. Failing to do this leads us into all sorts of dilemmas.

Moving from less primal to more sophisticated applications of this habitual learning pattern, action learning is a continuous learning process that can generate deeper and deeper levels of learning, self-inquiry and analysis the further you go into it. Putting this more simply, action learning enables you:

6. This activity was developed by Bill Cropper. It relates the action learning (or action research) cycle to the five disciplines of Senge, to link this segment to other segments in the manual from which these two segments are an extract.

To take action (introduce a change, implement an improvement, test out a theory) ... and ... learn from it (further research, more in-depth understanding, generate knowledge) ... more or less at the same time.

Learning through action is fundamental. Having said that, action learning is more than just *"learning by doing". This is where the action learning cycle comes into play. In between action and the learning we take from it, comes critical reflection.*

Critical reflection is central. It is this part of the learning process that provides the space for us to formulate to ourselves what "lessons" we've actually learned from what we tried out or observed. During critical reflection, you examine what happened previously — review, rethink, re-plan, re-evaluate and draw conclusions. Then you can decide what to do next — plan, propose or put forward new options or possibilities. Learning in this way continually extends the cycle of learning.

So after action comes critical reflection (What worked? What didn't? What have we learned? What might we do differently next time?) ... and... reflection is followed by further action (What do we try next? What conclusions from last time will change our plans for what we do next time?)

Multiple learning cycles are a must. This starts to suggest more of a cycle rather than a linear sequence. And most times, action learning is pictured as cyclical — or as a spiral — because you don't go through this cycle just once.

One cycle swirls into the next, building successively on the previous cycle of learning experience to create an ongoing spiral of learning and knowledge creation. It is this alternating between action and critical reflection that creates new learnings, fresh perspectives and insights.

So similar steps repeat themselves in similar sequence in repeated cycles of learning ... reflect → plan → act → observe → reflect → plan and so on…..

Participative inquiry is integral. Earlier cycles help sharpen up approaches, question old concepts and refresh our questioning (called inquiry frameworks) — which in turn leads us to challenge existing mental models, conventional wisdom and knowledge, and propose new concepts, which get incorporated into our thinking as we plan the next action steps to try in later cycles. We call this process of collective inquiry and re-thinking building shared meaning. Since action learning also tries to bring about real-time change or improvement, getting those who may be affected by changes actively involved and participating in it is also an axiom of success.

So to start the next cycle of learning, more Inquiry is needed (What assumptions have we made? Do we need new mental models/concepts?) ... And inquiry leads to more reflection – creating new concepts and building shared meaning (What do we understand from this? What sense can we make out of it?…)

So between reflection and action-planning comes inquiry and shared meaning. So the cycle gets deeper ... reflect → inquire → share meaning → plan → act → observe → reflect → inquire → share meaning → plan → act → ... and so on ...

Experimenting is essential. Action learning also strives to create 'safe' conditions conducive to real inquiry and dialogue, in which people are able to experiment and take risks they may otherwise not contemplate.

New propositions are developed and tried out, new concepts tested out — and then, we reflect, inquire and re-conceptualise what we've observed.

Components of an action learning team

As we examine action learning as it might be practised within an action learning team, we'll be considering a number of components:

The **project** — the task which is chosen as the vehicle for the learning

The **action learning team** (called the "learning set" in much of the action learning literature) is a group of learners who engage together to perform the task and learn from it

The **facilitator** (called the "set advisor" in much of the action learning literature) is someone who helps the team get off to a good start and learn from their experience

The **sponsor** — a senior and influential manager (usually one who understands the project) who secures resources for the project team and if necessary intervenes on their behalf with other senior managers

The **mentor** — a person, usually an experienced manager, who understands how project based learning is relevant to the organisation and can provide advice to the project team

The **support infrastructure** — the other mechanisms set in place to support the project team.

These are explained in more detail in what follows. Not all learning teams have all these components. The way they are implemented varies from learning team to learning team.

However, it is the experience of action learning facilitators that these components serve purposes which are valuable. If you are missing one of them, you will find it useful to think about how you can still achieve the purpose served.

Activity: select a project for a case study

The purpose of this activity is for participants at a workshop to have some realistic case study to use as a vehicle for their learning. In other words, you can use this case study to imagine how you would apply the material in this guide. The actual action learning teams will be made up of different participants, with different projects.

Think of some change or innovation that

- you believe would be beneficial for the organisation
- would be likely to have the support of your immediate superior
- you would like to work on
- you think it would help you develop skills of benefit to the organisation and useful for your own career prospects.

For this purpose you may use one of the situations connected with your Learning Initiatives, Regional Learning Improvement project, Lighthouse project or other designated project. [7]

? Write a brief description of the case study project

? Explain why you think it would be worthwhile for the organisation

7. These are Department of Families projects.

? Explain why it would be useful for you

If you are part of a learning team (for example at a workshop), now compare notes to the other members of your team. Choose a case study project which would be beneficial to your organisation(s) and to each of you.

? Write here the project that your team selected ...

In the remainder of this segment we encourage you to use this as a case study. As we address some aspect of setting up an action learning team, imagine yourself applying that aspect to your case study.

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1. Getting started

You will recall that the purpose of action learning is to achieve these outcomes:

- to complete worthwhile tasks and projects for the organisation(s)
- to develop useful skills and understanding on the part of the participants
- to contribute to learning in the team and in the organisation(s).

Worthwhile for the organisation

What strategic direction is the organisation pursuing? What skills will it need? A worthwhile project for the organisation(s) will be one which

- is consistent with the strategic direction of the organisation(s)
- is also a worthwhile project in its own right
- will develop skills which are likely to meet present and particularly future organisational needs
- will equip you with skills useful for the future

You can use the space on the right (above) for your own notes.

Worthwhile for individuals and team

You are likely to develop both content and process skills. For instance, if you are helping to develop a networking database, the content skills may include an understanding of networks and of databases. Whatever the project, you are also likely to develop communication, teamwork and problem solving skills.

? What are the skills that are most relevant to your career aspirations? Does the chosen project give you an opportunity to develop them?

Write down your response here….

2. Top management support

> For action learning to be successful, there must be top-level support for the program as well as for those participating in the action learning groups. Top managers ... demonstrate their support buy allowing and encouraging participation during work hours as well as providing appropriate space and facilities. Mike Marquardt, *Action learning in action* (Davies-Black, Palo Alto, Ca., 1999). p 216.

There are ways in which top management can demonstrate their support for action learning. Important among them are:

- ☐ Attend the start of workshops for beginning action learning teams and express support
- ☐ Make it clear how action learning teams address organisational objectives
- ☐ Participate in action learning teams
- ☐ Use action learning teams as their own way of engaging with complex and important problems
- ☐ Give credit in selection and promotion for the personal and professional development action learning provides
- ☐ Provide adequate resources.

There is a temptation when resources are scarce to skimp on the last of these. The result may be to persuade participants that management provides lip service but no real support. Recent evaluations of two action learning programs in the tertiary education sector raise an important issue related to this point.

In both programs the benefits to the organisation clearly outweighed the costs. (This has been so in almost every evaluation of action learning we know about.) Participants in both programs also reported that they were pleased they had taken part because of the personal and professional development they achieved. In both programs their major complaint was that they were inadequately resourced — they had to fit in the action learning on top of their normal work.

? Question for senior managers. Using the bullet points above as a checklist, how much support to you demonstrate, tangibly, for action learning programs?

? Question for learning team participants. Using the bullet points above as a checklist, how much support does management tangibly provide? What can you do (in upward communication) to point out the costs of any lack of support?

Here is space for your comments:

3. Participants

A. Who is (or will be) on the team

The size usually recommended is 6 to 8 people. If there is agreement on how the team members will work together, smaller or larger numbers may sometimes be appropriate.

If you are in the process of setting up the team, it will be an advantage to recruit people who

- will contribute to the team and its project
- will benefit enough individually to remain involved
- are likely to attend meetings consistently
- have the support of their organisation.

B. Who else will you involve

In all but very small project there are other stakeholders. In any event, it is often more effective to have a smaller action learning team and to access or co-opt other people as required.

See the tool "Stakeholder analysis" in the segment on "Enabling change". [8] Briefly, the purpose of stakeholder analysis is to:

- identify who can affect or be affected by the proposed change, and
- decide how they can best be approached to involve them appropriately in the change.

8. Not included here.

Activity: Identify stakeholders

Consider your chosen case study. Who are the stakeholders, and what level of involvement will be appropriate for each of them. (This will be more effective if you work in your team and do the analysis on butcher paper.)

WHO WILL YOU INVOLVE?	HOW WILL YOU INVOLVE THEM

Tool: Responsibility matrix

A responsibility matrix (or responsibility chart) is a simple way of recording who has be to involved, in what way, in the various classes of decisions which are expected to emerge.

The conventional layout is to list names or positions across the top of a matrix, decisions down the left, and symbols or letters in each cell to indicate the extent and nature of involvement for each type of decision.

Examples of the symbols which might be used are as follows.

V has power of veto; notify immediately
D must be directly involved in decision making
C consult but don't need to involve directly
I inform after the decision is taken

Some users also add

R Responsible: carries out the actions
A Accountable, held accountable for what happens

(It saps morale if you hold people responsible or accountable for matters beyond their control. If you use these, be sure that those held responsible and accountable are in fact able to achieve the outcomes.)

The resulting chart might look like this:

DECISION	NAME:	Abby	Bern	Claris	Dunc	Elly
Start team up		**V**	**-**	**R**	**C**	**I**
Develop action plan		**V**	**R**	**D**	**D**	**-**
Implement		**V**	**R**	**D**	**D**	**-**
Monitor		**-**	**R**	**I**	**C**	**-**

Activity: Responsibility matrix

Draw up a blank matrix on a sheet of butcher paper. With your action learning team prepare a responsibility matrix for your chosen case study.

Sponsors and mentors

It is an advantage for an action learning team to include people who have influence in relevant organisations, and political skills. Without these, it may be difficult to gain the necessary support from the organisations. However, if the team lacks these skills, it may be able to recruit support from people who can provide them.

A. Sponsors

Sponsors are people who can intervene on the team's behalf at senior levels in the organisation. They are senior managers who meet the following criteria:

- ☐ Sufficiently senior and influential to be able to intervene in the organisation(s) on behalf of the learning team?
- ☐ Sufficiently interested in the project to be prepared to give some time and energy to it, for instance because it is part of her or his responsibiliy?
- ☐ Able to model the leadership style which the action learning program is intended to develop?

? With your case study in mind, identify some of the senior managers who fit these criteria.

Here is some space to write down the people you have identified:

B. Mentors (a variety of "critical friend")

Identifying and enlisting a mentor may be useful for your team. They can help you find your way through the political thickets in organisations and communities. They are senior managers who meet the following criteria:

- ☐ Experienced in the managerial ranks of a relevant organisation or the like and respected for her or his political "nous"?
- ☐ Interested enough in the project or the action learning program to be willing to make some time available to the team?
- ☐ A suitable role model for the members of the action learning team?

? With your case study in mind, identify some of the senior managers who fit these criteria.

Here is some space to write down the people you have identified:

4. Choosing a project

> ... the project should be a problem and not a puzzle. A puzzle can be defined as a perplexing question to which an answer or solution already exists but has not been found. A problem, on the other hand, has no existing solution. Different people will come up with different ideas and suggestions as to how to solve it. Mike Marquardt, *Action learning in action* (Davies-Black, Palo Alto, 1999, p 25).

Your actual project (not your case study project for this workbook) may have been selected in September as part of the Future Directions Initiatives. It is nevertheless valuable to consider how well it meets the criteria below.

Recall that the purpose of action learning is to resolve real problems and at the same time develop relevant skills and understanding. This is most likely to occur when

- it is a complex and worthwhile problem
- quality and commitment are more important than quick solutions (see the "Decision types" tool)
- it is likely to yield worthwhile outcomes for individuals and their organisations.

Here's a checklist you can use to determine the probable suitability of a project

☐ Is it a problem rather than a puzzle? That is, is it complex and systemic? (See Mike Marquardt's definition above)

☐ Is it worthwhile enough for the associated organisations to support and resource it? Is it worth the effort required to resolve it?

☐ Is it likely to provide worthwhile learning (from both the content of the problem and the process of problem solving) for the participants and their organisations?

☐ Can the members of the action learning team be given enough responsibility to solve the problem?

☐ Do the members of the action learning team have the necessary skills and information, or access to them?

? Consider your chosen case study. How many of the conditions above does it satisfy? Tick those boxes beside the satisfied conditions. (If there are any conditions not satisfied it is probably not a suitable vehicle for action learning. You may be better served by a different approach.)

? If there is even one condition it doesn't satisfy, how can it be modified so that it does?

Write down your answer here:

5. Negotiating roles

> For an action learning team to be successful, members must be given information about the issue, situation, or problem that has prompted the formation of the team. [...] To achieve the team's purpose, the team members must be empowered to take action. Bill Rothwell, *The action learning guide book* (Jossey-Bass Pfeiffer, San Francisco, 1999), pp 14-15.

In this important phase the participants and the organisation come to a clear agreement about the scope of the program, the outcomes desired by all, and the resources and time to be made available for the project. It is best if these agreements can also be renegotiated later as knowledge of the program and project increases.

There are at least two sets of negotiations required:

- between the action learning team members and their organisations or superiors
- within the team, between the members of the team.

Both can be thought of as two way requirement: what is the person or team required to give? — and what will they be given?

A. Between team and organisations

What do the organisation(s) require from the team? For example:

- required outcomes from the project?

- any constraints on what the team can do?
- etc. (add your own)

What does the team require from the organisation(s)? For example

- adequate resources
- sufficient time to work on the project with the team
- etc.

See the tool "Freedom within limits" below.

B. Within the team

What does each person offer the team by way of relevant skills, experience, etc.? For example:

- specific technical expertise?
- access to important people and resources?
- etc.

What does each person require from the team if (s)he is to be effective in helping to achieve the team goals? For example

- moral support?
- understanding of her or his own expertise/situation/ and so on?

- etc.

C. With sponsor and mentor

Negotiate the availability of sponsor and mentor to the team, and the type of issues you expect they may be able to help you with.

(There is space beside each of the criteria, above, for you to note down your comments)

Tool: Freedom within limits [9]

Some managers seem to believe that you must either devolve responsibility entirely, or retain it for yourself. As in many such issues, there is a middle way.

If all of the following six conditions are met (typically in the relationship between team members and their superior officers) the stage is set for a team which achieves good outcomes for itself and the organisation, enjoys doing so, and learns much.

Note that for best results **all six conditions must be met**:

☐ Freedom ...

☐ within limits ...

(Do you give people freedom? Yes, and no. If you are clear about what must be achieved you can allow freedom within those limits)

9. Based on the research of Stanley Coopersmith, *The antecedents of self esteem* (Freeman, San Francisco, 1967).

☐ that are clear ...

☐ and negotiable.Are the limits clear, or flexible?

(Again, both. You don't have to choose between the two as alternatives. The limits can be clear but jointly negotiable and renegotiable)

☐ High aspirations and ...

☐ unconditional support.

(Do you challenge people and set high goals? Or do you support and nurture them, especially when they are in difficulty? Again, both can be achieved)

_____

_____

Activity: Freedom within limits

Check the relationship of your learning team with your superiors.

Are all the conditions met? If any are not, decide what you may have to renegotiate if your learning team is to be successful and enjoyable.

CRITERIA	ISSUES TO RENEGOTIATE
Freedom	
within limits	
that are clear	
and negotiable	
High aspirations	
Unconditional support	

? What are the limits, the "givens", in your project?

Write your answer here….

Activity: I give and I get

This activity is for negotiation within your action learning team. It is so that they team can make the best use of what you have to offer, and can provide you with what you need if it is to be a satisfying and effective experience.

A. Individual preparation. Working individually, identify what you have to offer to the team, and what you would like from the team. Record it legibly on butcher paper, using the entries below as a guide. Note that if you are overly modest about this, you do both yourself and your team a disservice. There are also additional spaces for you to add other contributions you can make.

ITEM	YOUR COMMENTS
What relevant skills do you have?	
What relevant experience do you have?	
What useful contacts do you have access to?	
What resources can you access or provide?	

What support would you like from others?

What sort of team climate do you prefer?

What learning do you hope to achieve?

B. Information exchange. All team members post their butcher paper on the well where all can see it. Each in turn reports what (s)he has to offer, and what she would like from others in the team. Record team agreements on another piece of butcher paper.

Activity: Groundrules

The purpose of this activity is to develop a set of groundrules or guidelines which all members of the learning set agree to observe, and use to monitor and improve their functioning as a team. (There may be relevant information from the previous activity.)

A. Working individually. Think back over the groups and teams you have worked in. As you recall what helped or hindered your satisfaction in those groups or teams, record it below. (Ignore the third column for the moment.)

WHAT HELPED	WHAT HINDERED	POSSIBLE GROUNDRULE

B. Collate groundrules in team. Collect the groundrules from each team member. Aim for about five or six, expressed clearly and preferably positively ("Do ..." rather than "Don't ..."), that all team members agree to. Record your groundrules below.

OUR GROUNDRULES

Activity: Using groundrules for monitoring

Here is an example of the groundrules which might emerge from an exercise such as that on the previous page. You may use it for your team, though it is better if you develop your own.

- Agree on and pursue common goals

- Share time and decision making
- Attend to others and listen for understanding
- Build on others' ideas
- Be open and honest about team processes
- All take responsibility for group effectiveness

How you develop or choose the groundrules is less important than how you use them.

Set aside some time near the end of each meeting of the learning team to review your own functioning. You can use groundrules by examining which ones you observed well and which you didn't. You can then decide if it is your behaviour or the groundrules which are most usefully changed.

A. Rate team functioning individually. Make up a response sheet similar to the following. To use each, each person rates her or his own behaviour in the team in the first line of numbers. (S)he rates the team performance in the second line.

Pursue private goals	1 2 3 4 5 6 7 1 2 3 4 5 6 7	Agree on and pursue common goals
Monopolise, dominate or withdraw	1 2 3 4 5 6 7 1 2 3 4 5 6 7	Share time and decisions
Ignore others, or listen passively	1 2 3 4 5 6 7 1 2 3 4 5 6 7	Attend to others and listen for understanding
Criticise ideas	1 2 3 4 5 6 7 1 2 3 4 5 6 7	Build on ideas
Conceal your views about the team's process	1 2 3 4 5 6 7 1 2 3 4 5 6 7	Be open and honest about team processes
Fight for leadership or leave responsibility to others	1 2 3 4 5 6 7 1 2 3 4 5 6 7	All take responsibility for group effectiveness

B. Collate and discuss. Collate the ratings by individuals. Note those groundrules which achieved the lowest score. Agree collectively on what you wish to do about it. If you think the groundrule is valid, agree on how you will change your behaviour. If you believe the groundrule doesn't apply, change or omit it.

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6. Initial teambuilding

There are three activities which can make it easier for an action learning team to function together in an effective and satisfying way

- Agree on the project outcomes
- Agree on the way in which the team will work together and
- Build high quality relationships with each other.

The first two of these have already been addressed. Outcomes are negotiated with the sponsoring organisations when a project is chosen. Activities for designing or choosing groundrules have been provided above.

The third, the development of quality person-to-person relationships, is important enough to deserve some specific attention. The following activity is a process for doing so.

Activity: Personal histories

This is an activity for building personal relationships and a sense of community in a team. It will help team members learn something of one another as people, not just as organisational roles. It also begins to develop a sense of community within the action learning team. It consists of individual preparation followed by an exchange of information in the group.

A. Individual preparation (Use the space on the right, below, as a worksheet)

- Think back over your life so far. Identify the "turning points", the important events and people which made a difference to you: how you thought of yourself, what you were capable of, the direction in which you moved, and so on. Write six of them in the space at the right
- Choose two or three of them (depending on the available time) that you are willing to talk about in your action learning team.

  Transfer them to the space below, leaving room for the next task

1.

2.

3.

- For each of the three, prepare three pieces of information which you can convey to your colleagues in a few minutes at most:
  - a brief description
  - a sentence on why it was important at the time
  - a sentence on what it says about you, now

  Use the space above for this

B. Exchanging information. When all learning team members have prepared their information, find a quiet spot where you can give each other your full attention. Each person then relates one of her or his turning points. When everyone has had a turn, each person then relates another one.(In other words, if you are exchanging two turning points, go around the group twice.)

Speaking

When you are relating your turning point to the others, remember that the purpose is to reveal something of yourself as a person. It will work best if you use your notes only as a guide, and look at the people you are talking to.

Listening

When you are listening to another person's turning point, give her or him 100 per cent of your attention. Put your own thoughts and concerns aside. Listen with your eyes as well as your ears. Offer brief responses when that seems appropriate.

This activity is intended to help the action learning team begin well. When the team members are working together cooperatively on shared problems, an appropriate style of communication will maintain their relationships.

In his 1971 training film "*Confronting conflict*" Sheldon Davis facilitated a team building demonstration session between three members of an organisation. In a low-key facilitation Sheldon encouraged people to express their feelings towards each other as well as the more tangible requests they had of each other. They did so, and eventually a resolution was reached.

After the demonstration Sheldon is asked by Saul Gellerman what principles guided him in his facilitation. He replies that he tries to help people experience each other as people. When they do so, he explains, the caring that is potentially there is able to emerge. They are then motivated to seek an outcomes that satisfies the other people as well as themselves.

There are other approaches to relationship building which help team members to understand the diversity in the team. This can be done using self scored questionnaires such as the Myers-Briggs Type Indicator or the Belbin Team Roles

Questionnaire. These are best facilitated by someone familiar with the particular questionnaires.

We won't go into further details about it here.

7. Getting the communication right

> Understanding, interpretation, meaning, and language are intertwined. [...] our openness to what is human requires us to be attuned to the languages and symbolisms in which human existence and human meaning express themselves and speak to us. Valerie Malhotra Bentz and Jeremy J. Shapiro, *Mindful inquiry in social research* (Thousand Oaks, Ca., 1998), p 166.

Action learning is individual learning, team learning, organisational learning, community learning. The vehicle by which these four levels of learning occur is communication, especially face to face communication.

To engage well in such interaction requires three sets of skills:

- to understand others
- to express ourselves so others can understand and
- to use a constructive process of interaction.

The following pages offer some useful models and tools which will help you to improve these three sets of skills.

As you work through the following pages you will find it useful to have a "relationship case study" — a relationship which is important to you, and which you would like to improve. You will then be able to consider how you might use the models and tools we describe.

Activity: Choosing a relationship case study

? Think of a relationship you would like to improve. What is the relationship, and what are the features of that relationship you would like to change?

Write your answer here….

? What improvement to the relationship would you like to bring about?

Write your answer here….

The question to hold in your mind over the following pages is ...

? What can you do to improve the relationship so that it is an improvement for you and the other person?

Tool: Perceptual positions

To get information. To give information. To manage a constructive interaction. Three sets of skills. Each of them requires a different mindset, a different attitude, a different purpose. A different perceptual position.

PERCEPTUAL POSITION	YOUR COMMENTS
First position. Your attention is on your own thoughts and feelings. Your strategy is to persuade the other person to your point of view. Your purpose is to look after yourself and get the outcomes you want. It's as if your presence and attention is entirely where you are. How well do you do this? How much of the time?	
Second position. Your attention is on the attitudes of the other person, and the effects on them of what you say and do. Your strategy is to try to work out what their interests are. Your purpose is to understand them. Although you are physically where you are, it's as if psychologically you are where they are. How well do you do this? How much of the time?	

Third position. Your attention is on the interaction between you and the other person. Your strategy is to be unaffected by the topic of conversation so that you can observe what is happening. Your purpose is to manage the process of interaction.

Its as if you were an innocent bystander or a "fly on the wall", observing from afar.

How well do you do this?

How much of the time?

There are both constructive and unconstructive ways of being in each of these positions. The constructive ways require ...

- For first position expressive skills
- For second position listening skills
- For third position process skills

We examine these in turn.

Expressive skills — to be understood by others

> "Seek first to understand, then to be understood." Stephen Covey, *The seven habits of highly effective people* (Business Library, Melbourne, 1990), p 235.

All three sets of skills are needed. The skills which are least well used by many people are listening skills.

Why aren't we starting there? Because it's easier to explain the expressive skills first. There are some important distinctions, of relevance to all skills, to be made. They are particularly relevant to expressive skills.

Activity: the distinction between fact and interpretation

Find a place where there is a fair amount of activity about you. Close your eyes. Listen to the sounds.

Your task is to describe what you hear — without interpretation.

For instance, you can't say "I hear a door closing" or "A car passed by". That's interpretation. Your task is to describe the raw sounds which you hear, without revealing anything of its meaning.

? What was it like to take part in that activity?

Write here what your experience of the activity was ….

What was it like? Here's our guess. We think you found it impossible or near to impossible. We think you heard a car. And you said to yourself, "No, I'm not supposed to say that. Now, what does a car sound like?". We think that you found that we don't even have a language for describing sounds. Our senses

and our brain interpret everything, and interpret all the time. And here is the important point ...

*We **hear** a car. We treat our interpretations as if they were fact.*

When it is a matter of cars and doors and the like we mostly get it right. When it comes to other people, and especially their motives and intentions, we're on shaky and dangerous ground. We need to take special care, and learn some new skills.

Speaking without blame

We're not saying that it's possible to deal only in facts. We're not saying it is desirable to do so. What we are saying is that it is useful ...

- to be aware of how we deal in interpretations rather than facts
- to distinguish between interpretations and the evidence for them

There are a number of people who have offered valuable suggestions for doing this ...

Tool: The ladder of inference

> "What is 'real'? How do you define 'real'? If you're talking about what you can feel, what you can smell, taste and see, then 'real' is simply electrical signals interpreted by your brain." Morpheus, in the film "*The matrix*".

Chris Argyris, and following him Peter Senge, have both made use of the notion of a "ladder of inference" stretching from the near-to-factual to the most abstract. We'll use their label, but draw upon the work of Alfred Korzybski to identify some of the points on it.

"events"	Stimuli from "reality", which we don't experience directly, impinge on our senses. This is the event level.
↓	
objects	We interpret the stimuli as objects or the results of objects.
↓	
labels	We then label them in the way we've learned to do: "car".

Beyond this, we form higher abstractions, themselves labels: for instance, "vehicle".

Higher abstractions are valuable. After all, they form the explicit theories and models which we use to make sense of the interactions between objects. We also use them to help others learn.

The use we are suggesting for the ladder of inference is that you try to be aware at any moment about where you are on the ladder of inference. The further from the event level, the more we suggest that you offer your interpretations knowing that they are not facts, and you may be mistaken.

? Think about the case study, the relationship, you chose at the beginning of this section on communication. How close to the "event level", the "facts", was your description of the relationship?

? What do you conclude from this?

Speaking clearly

Remembering that if we first listen to understand the other, we can apply our awareness to express ourselves more effectively. We can state our position while

- being clear about both the "facts" and our interpretation of them
- and at the same time minimising blame and criticism.

Developing her approach from Chris Argyris, Viviane Robinson (*Problem based methodology*, Pergamon Press, Oxford, 1993) offers an easily remembered way of doing so.

Tool: Viviane Robinson's framework

Viviane Robinson suggests that, when stating our point of view to others, we include three types of information. Each is communicated in a different way. Their order may vary depending on the situation. But all must be included:

Evidence	Work as close to the base of the ladder of inference, the "event level", as possible Provide the evidence as specifically and concretely as possible, in a form which allows it to be verified Avoid blame or criticism or demand

Interpretation	Offer an interpretation of what you think the evidence means
	Aware that it may be mis-taken, offer it tentatively
	Clearly label it as interpretation
Encouragement	Offer genuine and vigorous encouragement to the other person to challenge the evidence or interpretation or both

? In the space above to the right, using Viviane Robinson's framework, note down how you might now describe the relationship you have chosen as your case study

Listening skills — to understand others

> You've spent years learning how to read and write, years learning how to speak. But what about listening? What education or training have you had that enables you to listen so that you really, deeply understand another human being from that individual's own frame of reference? Stephen Covey, *The seven habits of highly effective people* (Business Library, Melbourne), p 237-238.

There are many levels of listening. Here are three of them ...

Pretending to listen. You nod and say "mm" and "uhuh", but your attention is elsewhere. You're really doing something else, perhaps working out what you're going to say when it's your turn. Perhaps you're in first position. Perhaps you're not in first, second or third position — you're just not engaged.

? How often do you listen like this?

? How would it affect you if you were on the receiving end?

Listening for ammunition. You're listening selectively. You're noting the information that's useful for you. You're noting what you agree and (especially) disagree with. You're in first position.

? How often do you listen like this?

? How would it affect you if you were on the receiving end?

Listening to understand. You genuinely want to understand what it is like for the other person. You're listening with eyes and eyes for the whole message, both what is said and what is implied. You're in second position, perhaps with an occasional brief move into third.

? How often do you listen like this?

? How would it affect you if you were on the receiving end?

? Which of these styles of listening best describes *your usual approach*? If you were on the receiving end of each, how would it feel for you? You can use the space at the right (above) to note down your ideas.

? Which of these styles best describes your approach in the *case study relationship* you've chosen? If you were on the receiving end of each, how would it feel for you? What do you think it's like for the other person in the relationship? You can use the space at the right to note down your ideas.

When you think you genuinely understand the other person you can check with them to see if you've understood them.

Active listening

Listening, genuine listening, isn't a passive activity. It requires that you put aside your own concerns for the moment while you try to understand, really try to understand, what it's like for the other person. You have to "tune in" to them — listen with your intuition as well as your intellect. You have to be concerned for the moment more about them that about yourself.

It also requires that you take into account what the other person says, and how she or he says it. It's what Thomas Gordon (*Parent effectiveness training*, Wyden, NY, 1970) calls "listening for the real message". It also requires that you regard your interpretation of the message as tentative until you've checked it out.

How, exactly, can you do that?

Tool: "LACE"

You can think of good listening behaviour as having four components:

Listen with eyes and ears for genuine understanding. Your only goal is to understand what it is like for the other person in this situation — what they say, and also what they imply

Acknowledge what you think they have said and implied by restating it, tentatively, in your own words

Check that you have it right by making it as easy as possible for the other person to add to what you've said or to correct you

Enquire after more understanding by asking specific question.

? Consider the case study of your chosen relationship. How much use do you make of each of these? With what results?

Write down your response here….

Most people overuse enquiry and almost never use acknowledgment.

You can actually omit enquiry entirely. This is what Gordon recommends in his "effectiveness training", and is found in some forms of counselling. We don't recommend doing so. We do encourage you to use it only when the other person isn't upset.

At team level, this style of listening becomes "dialogue".

8. Engaging with the project

> Action learning stresses the simultaneous achievement of actions and learning. Krystyna Weinstein, *Action learning, a practical guide*, second edition (Gower, Aldershot,1999, p 7)

If you join the action learning team at this point there may be earlier steps you may wish to revisit. Aspects worth attention are:

- The selected task or project. Have you yet thought about your learning goals?

- The composition of the learning team. Are there others who should be included or consulted?

This and the following step occur simultaneously. Team members alternate between action oriented work and critical reflection on that work to identify the learning.

It is through ongoing reflection, on all phases of the work, that learning occurs. It is when reflection and learning occur throughout the work that the earlier learning is able to inform the later actions.

Here is the five step change process from the segment *Enabling change*: [10]

- foundation building: understanding the present, the desired future, and the expected benefits (including learning
- designing the change game: identifying the scope, developing the learning plan, building support
- getting started: planning the actions and monitoring, anticipating the risks
- taking actions, and monitoring them as you go
- finishing the game: embedding results, relationships and learning; celebrating the benefitsSome of these five stages have sub-stages. They are developed in a little more detail in the following pages.

The steps of engagement

A brief version of the process follows. You may use it as a checklist.

10. The *Enabling change* segment, including this five step model, was written by Brian Donaldson. The segment is not included here.

A. Foundation building. Clarifying the needs and the benefits, and understanding the existing situation.

- ☐ Where are we now? What can we do to analyse and understand the present situation? (The tool "force field analysis" [11] in the toolkit is relevant here)
- ☐ Where do we want to be? How can we agree on a worthwhile goal which people will be motivated to achieve? (The tool "search" in the toolkit is relevant here)
- ☐ What will the benefits be? Who are the stakeholders and how will we define their legitimate needs?
- ☐ What learning do we hope to achieve? How will we define our learning outcomes?

B. Designing the change game. Developing the initial plans for action, building support, obtaining necessary resources.

- ☐ How will we get from here to there? How can we develop a practical and motivating and flexible action and monitoring plan? (The first part of the tool "event track" in the toolkit may be relevant here)
- ☐ What resources will we need? What can we do to identify and obtain the necessary resources, including skills and time?
- ☐ What support can we obtain? Whose support do we need and how can we obtain it?
- ☐ How ready are the stakeholders for this? How can we find out? (The tool "readiness check" in the toolkit may help here)

11. The toolkit referred to in this and following paragraphs is not included.

C. Getting started. Elaborating the plan, engaging the people, building in the monitoring and the learning. This is still the planning phase, to ensure that we are agreed, in some detail, on what it is we are going to do. (The tool "event track" is relevant throughout this step.)

- ☐ Planning to take action. Who can do what to achieve our outcomes? How will we govern and do the work and manage the risks?
- ☐ How will we stay on track? What specific steps do we need to take to monitor the work, the relationships and the learning? What timelines, mileposts and indicators will be useful?
- ☐ What else do we need to do to achieve the outcomes? What other information do we need, and from whom? How will we identify and document the learning?
- ☐ Have we allowed adequately for monitoring it as we go? Have we designed enough flexibility into it?

4. Taking action. If the preparation and planning are adequate, this is the easy part. Provided there has been adequate monitoring and flexibility built into the plan, and those involved are committed, it is likely to proceed without major difficulty. Ongoing monitoring is important.

See also the next part of this segment, on learning. You will recall that action and learning proceed simultaneously.

- ☐ Doing the work (on tasks, relationships and learning). How will we keep it moving? How will we monitor and correct it? What communication systems to we need to maintain?
- ☐ At the same time, how will we maintain interest in identifying and documenting and disseminating our learning?

5. Finishing the game. Embedding the outcomes and the learning in the organisation. Communicating the results.

- ☐ Did we get there? Did we achieve all the results and can we maintain them? Are the benefits what we hoped for? Who should we involve in the celebration of our successes, to acknowledge them?
- ☐ How can we consolidate the learning that has occurred throughout the project? What further learning can we capture? How can we ensure future benefit from it, and benefit for others?
- ☐ Who can profitably hear about what we have learned? Who do we need to report to? Are there further implications we can identify and communicate?
- ☐ Have we allowed adequately for monitoring it as we go? Have we designed enough flexibility into it?

Activity: Trying out the steps of engagement

Apply these steps to your chosen case study. As you work through them, imagine yourself carrying out the necessary actions, or facilitating the carrying out of those actions by others. Note the steps you can imagine without difficulty.

Note those about which you are still not entirely clear. What will you do to learn more about them? —

? What do you wish to learn more about?

? Where can that information or understanding be found?

? How will you obtain and use it?

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9. Learning from the project

> Action on a problem changes both the problem and the person acting upon it. It proceeds particularly by questioning taken-for-granted knowledge. Mike Pedler, *Action learning in practice* (Gower, Aldershot, 1997), p xxiii.

This phase takes place at the same time as the action. It is interleaved with the action. It is the phase which is often given most attention in the literature. Although without the other phases the program may not be effective, its importance warrants that attention.

Much of what the members of an action learning team do together is to help each other learn from their experience, and document that learning. Here is your opportunity to try out a suitable process by applying it to your learning from this and the previous segment.

Activity: The experiential learning cycle

To help you think about the learning you obtained from this and the following segments, work through the following steps. The space on the right is for your notes.

- What happened?

  (Before you reflect on an event, it is useful to recollect the event in detail)

- What was the sequence of events? In particular, what were the surprises?What sense do you make of it?

  (It is easier to apply learning if you first become aware of what you learned, and you record it in a form that translates easily into action)

- What have you learned about which actions achieve which outcomes in this situation? (Remember the "theory of action" material above)How can you make use of it?

  (The form of learning we are interested in here is learning for and from action)

- What are some of the situations in which you can make use of your new insights?

- What will you do differently the next time you find yourself in one of those situations?

The above activity is well suited to a group activity in an action learning team.

Resources

A partly-annotated bibliography on action learning and related topics

Argyris, Chris (1990) *Overcoming organisational defenses: facilitating organisational learning*. Boston: Allyn & Bacon.

One of the most readable of Argyris's many valuable contributions.

Argyris, Chris (1999) *On organizational learning*, second edition. Oxford, UK: Blackwell.

Argyris, Chris (2000) *Flawed advice and the management trap: how managers can know when they're getting good advice and when they're not*. Oxford, UK: Oxford University Press.

Argyris, Chris, and Schön, Donald A. (1996) *Organisational learning II: theory, method and practice*. Reading: Addison-Wesley.

Integrates much of the material that has come from the pens of Argyris and Schon, separately and together, over several decades

Argyris, Chris; Putnam, Robert and Smith, Diana McLain (1985) *Action science: concepts, methods and skills for research and intervention*. San Francisco, Ca.: Jossey-Bass.

Offers a methodology for researching social systems in ways which gain more valid data while treating those researched as mature and responsible adults. In effect it is equivalent to a form of participative action research, with particular attention given to the dynamics of interpersonal interaction and system behaviour.

Ballantyne, R., Bruce, C. Packer, J. (1993) *Action learning in vocational education and training, theoretical background, Vol. 1*. TAFE National Staff Development Committee.

Casey, D. (1993) *Managing learning in organisations*. London: Open University Press.

Casey, David, and Pearce, David W., eds. (1977) *More than management development: action learning at GEC*. Farnborough, Hants.: Gower.

Christensen, C. Roland, Garvin, David A. and Sweet, Ann (1991) *Education for judgment: the artistry of discussion leadership*. Boston, Mass.: Harvard Business School Press.

Coghlan, David (2000) *Doing research in your own organisation*. Sage.

A practical book on insider action research.

Cunningham, J. Barton (1993) *Action research and organizational development*. Westport, Connecticut: Praeger.

A broad overview of the methods and processes of action research applied to organisation development.

Dixon. N. (1994) *The organisational learning cycle*. Maidenhead, UK: McGraw-Hill.

Dotlich, David L. and Noel, James L. (1998) *Action learning: how the world's top companies are re-creating their leaders and themselves*. San Francisco, Ca.: Jossey-Bass.

Farber-Robertson, Anita (2000) *Learning while leading: increasing your effectiveness in ministry.* Bethesda, Md.: The Alban Institute.

This is a beautifully written and practical summary of Argyris's ideas, clearly explained and copiously illustrated with examples. The themes are taken from Argyris; the examples and explanations are the author's. They make the themes more accessible than they are in much of Argyris's own writing. Though drawn from the ministry, the examples and accompanying discussion are especially illuminating. Concepts which

the author uses well include designed blindness, social virtues, and the ladder of inference.

Fisher, Dalmar, and Torbert, William R. (1995) *Personal and organizational transformations: the true challenge of continual quality improvement*. London: McGraw-Hill.

How to apply the processes of action inquiry, among others, to bring about personal and organisational transformations.

Flood, Robert L., and Jackson, Michael C. (1991) *Creative problem solving: total systems intervention*. Chichester: Wiley.

Flood and Jackson are systems theorists with an interest in organisational applications. This book describes a particular form of systems approach known as total systems intervention or TSI. It can be regarded as a form of systems-based action research.

Flood, Robert L., and Romm, Norma R.A. (1996) *Diversity management: triple loop learning*. Chichester: Wiley.

With systems becoming more complex and theories and approaches multiplying, the authors offer ways of dealing with this theoretical and practical complexity

French, Wendell, and Bell, Cecil H. (1995) *Organization development: behavioural science interventions for organisational improvement*, fifth edition. Englewood Cliffs, NJ: Prentice-Hall.

A substantial revision of what was probably already the bible in its field. Set firmly within an action research framework, it gives a good mix of history, theory and practice.

Gummesson, Evert (2000) *Qualitative methods in management research*, second edition. Thousand Oaks, Ca.: Sage.

This is the second edition of a book noted for its wide-ranging examination of qualitative research, its philosophy and practice, with reference to management research. Chapter 6, "A management action science paradigm", is especially relevant to action researchers. However, as the book takes into account issues of both management consultancy and applied research, there is useful material for action researchers throughout the book.

Inglis, Scott (1994) *Making the most of action learning*. Aldershot, UK: Gower.

Lawler. A. (1985) *Productivity improvement manual*. Aldershot, UK: Gower.

Lessem, R. (1993) *Business as a learning community — applying global concepts to organisational learning*. Berkshire, UK: McGraw Hill.

Marquardt, Michael J. (1999) *Action learning in action: transforming problems and people for world-class organizational learning*. Palo Alto, Ca.: Davis-Black.

Practitioners will find this a valuable resource. Beginning with an overview of action learning and its origins, it illustrates the approach with copious and often detailed case study material. Several chapters at the end of the book then take the practitioner through the steps required to set up, maintain and monitor an action learning project.

McGill, Ian, and Beaty, Liz (1995) *Action learning: a guide for professional, management and educational development*, second edition. London: Kogan Page.

A very practical account of action learning and how it operates in action.

McNiff, Jean, and Whitehead, Jack (2000) *Action research in organisations*. Routledge.

Metcalfe, Mike (1995) *Business research through argument*. Boston: Kluwer Academic.

The central thesis of this academic and quite expensive little book is that research is better done according to the rules of argument rather than the rules of scientific method.

Mumford, Alan (1993) *How managers can develop managers*. Aldershot, UK: Gower.

Mumford, Alan, Ed. (1997) *Action learning at work*. Aldershot, UK: Gower.

An expensive but valuable collection of papers on action learning in organisational settings.

Pedler, Mike, ed. (1991) *Action learning in practice*, 2nd edition. Aldershot, Hants.: Gower.

A collection of most practical papers by people who in many instances are experienced practitioners in action learning methods.

Pinchen, Suzanne, and Passfield, Ron, eds. (1995) *Moving on: creative applications of action learning and action research*. Mt. Gravatt, Queensland: Action learning, Action Research and Process Management Assn, Inc.

Proceedings from an action learning conference.

Raelin, Joseph A. (2000) *Work-based learning: the new frontier of management development*. Upper Saddle, NJ: Prentice-Hall.

Reason, Peter, and Bradbury, Hilary (2000) *Handbook of action research*. Sage.

Possibly one of the most important collections of papers on action research that has yet been assembled.

Revans, Reg W. (1980) *Action learning: new techniques for management*. London: Blond & Briggs.

By the person who developed and first described action learning.

Revans, Reg W. (1982) *The origins and growth of action learning*. Bromley: Chartwell-Bratt.

Revans, Reg W. (1983) *The ABC of action learning: empowering managers to act and to learn from action*, third edition. London: Lemos & Crane.

Robinson, Viviane (1993) *Problem-based methodology: research for the improvement of practice*. Oxford: Pergamon Press.

This book takes Argyris' ideas on interpersonal and system dynamics, and operationalises them as processes for intervention and research. The result is in effect a form of action research, but where adequate attention is given to researcher-client relationships. The first half of the book describes two action science interventions. The second half compares action science to other methodologies which might have been used.

Rothwell, William J. (1999) *The action learning guidebook: a real-time strategy for problem solving training design and employee development*. San Francisco, Ca.: Jossey-Bass/Pfeiffer.

A pragmatic and detailed account of action learning: its underpinnings, its facilitation, its evaluation. It is complete with worksheets (also included on a computer disk). Used with some flexibility and openness to the actual situation and people, it offers the action learning practitioner detailed guidance.

Ryan, Yoni, and Zuber-Skerritt, Ortrun, eds. (1994) *Departmental excellence in university education (DEUE)*. Brisbane: Tertiary Education Institute, The University of Queensland. [Occasional paper series - No. 3]

A report on a university action learning program

Torbert, William R. (1991) *The power of balance: transforming self, society, and scientific inquiry* . Newbury Park, Ca.: Sage.

Torbert's "action inquiry" is an action-learning-like process and approach which, like action learning, pursues both understanding and change.

Watkins, Karen E. (1991) *Facilitating learning in the workplace*. Geelong, Vic.: Deakin University Press.

From the keyboard of a writer with much experience in helping organisations improve workplace learning.

Weinstein, Krystyna (1995) *Action learning: a journey in discovery and development*. Harper Collins.

A mostly-introductory book on action learning, practical and useful.

Whyte, William Foote (1991) *Social theory for action: how individuals and organisations learn to change*. Newbury Park: Sage.

An account of an action research approach to the management of change, from one of the leading writers in the field. The emphasis is on participative action research in agricultural and organisational settings, using methods which integrate theory and practice

Winter, Richard (1989) *Learning from experience: principles and practice in action research*. London: Falmer Press.

Discusses the principles of action research, and then presents some examples to illustrate the approach. The main focus is on educational research, but the issues addressed have wider relevance.

Zuber-Skerritt, Ortrun, ed. (1991) *Action learning for improved performance*. Brisbane: Aebis.