

Action Learning Sets

A Guide for Small and Diaspora NGOs

INTRAC



PEER LEARNING PROGRAMME

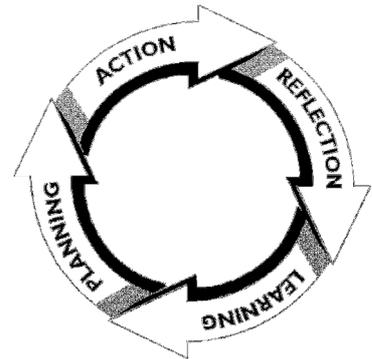
*'There can be no learning without action and
no sober and deliberate action without learning'*

*'The mark of a person is in the questions they pose,
not just the statements they make'*

Reg Revans

1. What are action learning sets?

Action learning sets are a simple and powerful way for individuals to learn from each other. They are a popular method in the field of action learning. Action learning is a process which involves working on real challenges, using the knowledge and skills of a small group of people combined with skilled questioning, to produce fresh ideas and reinterpret familiar concepts. Initially developed by Reg Revans, it follows the process outlined in this diagram of explicitly stopping to reflect back on actions taken, drawing out learning from that reflection, and applying that learning to planned practice.



Action learning sets are a core element of the Common Ground Initiative Peer Learning Programme (CGI PLP). They have been tried and tested and found to be effective in a wide variety of contexts. In the PLP, groups of 3-7 people will meet every 4-6 weeks to reflect on practical issues. In structured half-day sessions, participants will take it in turns to present a significant challenge facing them in their day-to-day work. Set members help work on the problem through supportive, but probing, questioning. It is not about members giving advice or trying to provide answers. The focus is on learning from experience and putting it into action immediately. This offers the potential for rich, relevant and highly applied learning. Some key features of an action learning set are:

- People challenge and support each other
- A climate of confidentiality and openness is created within the group
- People seek solutions to real work issues and use real experience
- People are encouraged to be explicit

2. What can I get out of being part of one?

Being part of an action learning set offers you:

- Space for individual reflective learning
- Learning to take back to the workplace and translate into action
- Support and challenge from peers
- A chance to find creative ways to bring about change
- A chance to test beliefs and assumptions and learn what works
- A safe environment to explore new ways of thinking and doing
- Personal, as well as professional, learning and development
- Insight into how others achieve different solutions
- A chance to progress new opportunities and develop new ideas.

3. How do they work?

The set meets for half a day, every 4-6 weeks. If they have met before the process may follow this format. This is a sample guide, not set in stone, and timings are flexible:

- i. Start with follow-up from last time. People who have presented before will give action report updates (15 minutes).

- ii. Then one person presents a problem, a situation or an opportunity. This may have been agreed beforehand. Everyone should present fairly regularly but there should also be the possibility to accommodate any urgently-arising issue for a set member. The presenter may use a flip chart to draw or describe the structures or salient points of the issue (10 minutes).
- iii. Other group members then ask questions. Initially there might be 5 minutes of clarification to make sure the group has understood the issue. What follows is not a general discussion, but nearer to group counselling. The aim of the discussion is to encourage the presenter's learning. Members of the set, by giving close attention, and especially by asking open questions, enable the problem-presenter to get a deeper understanding of the problem. Experience has shown that the best way to work is to offer questions slowly, one at a time, and always to the problem-presenter. In this way the set helps the issue holder clarify the situation, to see various options and to choose one of them. The group members may take another 5 minutes to discuss amongst themselves. (25 minutes)
- iv. The presenter then has a chance to respond – perhaps fixing an intermediate goal and to outlining next steps. (5 minutes)
- v. The facilitator may then step in to review the process, understanding of the issue and confirm actions. (10 minutes)
- vi. Then a second person will then present their issue following the same process.
- vii. The last 15 minutes is spent with members reflecting on the session and summarising their views of what has happened. Things that went well should be noted and celebrated. They should suggest ideas to improve the process for next time.

4. What does the presenter have to do?

The presenter brings their issue, problem, or project to the rest of the group. He or she:

- Describes the issues of concern through a narrative account
- Describes how it really is in the 'here and now'
- Receives questions from others in the group
- Takes and addresses only those questions which they are comfortable with
- Decides on action points to take forward and commit to, and shares these
- Reports on ensuing events at a subsequent meeting of the group

'Airspace' is the time during which one participant, the problem-presenter, tells the other members where he or she has got to since the last meeting. They tell a continuation of a 'story' which other members get to know well, and become involved in.

The value of action learning is that this 'airspace' gives you an opportunity to focus on:

- Your story, and not just a history of a series of events
- Your experiences, and not just facts and figures

- Your anecdotes, and not just a progression of events
- What you felt like, and not just what was happening
- Your metaphors (to help you understand), and not just the facts.

In other words, the problem-presenter is in charge of his or her own airspace. It helps if the presenter is clear in their own mind about what they want to achieve from their airspace, and what they will do to ensure this, as well as what they will ask of the set. This requires a bit of preparation. They need to tell the set what they want, and point out to the set what is not helpful.

Some useful statements for presenters:

- 'I'd like to explore...'
- 'I'm wondering whether...'
- 'I'm not sure if...'
- 'I'm uncertain about...'
- 'I can't decide whether...'
- 'I'm puzzled by...'
- 'I'm confused by...'

What makes a good topic?

A good topic is almost anything that a member wants to work on in order to generate action points. Having said that, action learning sets work better if the issue is complex – where there is not a clear technical answer. It may even be that in frustrations with a blockage in moving a project forward, part of the problem is not being quite clear what the issue is. In addition to this, the issue should be something:

- Both work related and affecting you personally
- For which you have some level of responsibility
- That you are able to influence
- That you can make progress on within the timescale of the programme

5. What do set members do?

Set members who are not presenting:

- Listen actively and attentively
- Watch for non-verbal cues, such as body language, hesitations
- Are attentive to the feelings as well as the words of the presenter
- Do not intervene (unless an agreed part of the process)
- Ask questions that encourage the presenter to understand the problem for him/herself more clearly
- Are prepared to probe and challenge the issue holder's personal interpretations
- Are always supportive, encouraging and empathetic
- Give feedback appropriately, honestly, and with discretion
- Observe the agreed 'ground rules' for conduct of set members
- Never diagnose, recommend, interpose own agenda or give personal solutions
- Never judge or impose own values

The aim of the discussion is to encourage the presenter's learning, by actively listening and asking probing questions. Good questions are at the heart of learning, and are a critical leadership and management skill. Asking the right questions is a discipline to practice in sets. Asking helpful questions is not always easy. The secret is to get people talking, so saying 'I don't understand', 'Tell me more', or 'You seem to be glossing over...' encourages them to say more.

Most participants find that it is helpful if the questioners preface their questions with an indication of what they are after:

to **clarify** - 'Are you saying that...?'

to **try to understand** - 'Could you explain so-and-so a bit more...?'

to **follow through a train of thought** - 'You said a moment ago that .. If that's the case, what would happen if...?'

to **mirror** - 'So what you're saying is...?'

to **open up new avenues** - 'Have you explored / thought of...?' or 'Would ... be of any help?'

to **challenge** - 'What do you feel most uncomfortable about?' or 'What do you feel most challenged by?'

to **elicit honesty** - 'Do you feel you're making any impact - and if not, what can you do about it?'

to **unpeel layers, to dig deeper** - 'And then what happened...?'

to **check out** - 'Are we asking helpful questions?' or 'What haven't we helped you with yet?'

Questions may sometimes evoke a defensive response in the presenter. The set can address this either by asking why the presenter is feeling defensive - which in turn might open up something that needs to be explored further.

Good questions to ask

Clarification

- What happened?
- How do you see it?
- What makes you say that?
- What else can explain the situation?
- Could you say more about how you felt?
- Who will be affected if you are successful?
- Who might help you?
- What obstacles do you envisage?

Probing

- What is the difference between the current situation and the way you would like it to be?
- Can you explain?
- What exactly...?
- Who else matters to this process?
- Can you give an example?
- What happened...and?
- Who are 'they'?
- How do you feel?
- What assumption are you making?
- Is that assumption stopping you?

Action

- If all decisions rested on you, what would you do?
- What are your options for action now?
- What other possibilities exist?
- Where could you get more information about this?
- Who else might have an interest in this?
- What are you going to do for yourself before the next meeting?

Three ways to listen

'Listening to the Head' - the Thinking Level - to thoughts, facts, concepts, arguments, ideas and the principles behind these. This is the way of listening that we are most familiar with.

'Listening to the Heart' - the Feeling Level - to feelings, emotions, mood, experience and the values behind these. Listening to feelings can give us important clues about what really matters. Strongly expressed or strongly denied feelings can provide fruitful entry points to key issues behind experiences. These may be 'heard' more through the tone of voice, facial expression, than what is actually said. Silences are also important to 'listen' to as they often express the feelings of the speaker.

'Listening to the Feet' - the Will Level - to intentions, energy, direction, motivation. If a person's will does not shift, nothing else will. Our ability to read a person's or group's will is a prime enabler of our ability to work effectively, in a real way. To sense the real intentions of another person, what they want, why they are telling you this or that, can be one of the hardest aspects of the art of listening.

Adapted from CDRA 'The Barefoot Guide for Social Change' <http://www.barefootguide.org/>

6. What does the facilitator do?

In action learning sets the main role of the 'facilitator' is to 'hold the process' and ensure the focus remains on learning about the real issues. The facilitator should act when appropriate to prevent digression, to ensure that questions are formulated in an 'open' way, and to keep things to time. This may involve pointing out helpful and unhelpful roles of the group's interaction.

The facilitator may intervene through a question or statement, such as 'Can you rephrase that question in a more open way?' or 'I observe that you are giving advice rather than letting the presenter find their own answers' or 'You seem not to be paying attention to the root of the matter' or 'Ensure you keep giving each other equal time to interact with the presenter'.

The facilitator sets the tone for the meeting and models the actions of being a good set member. They can interject at any time, but mostly when he or she thinks the group needs support and guidance in the questioning. This will probably be more the case in the first couple of sessions.

For 2011, the programme will provide an external facilitator, though in time the sets can become self-facilitated. The facilitator will assist in scheduling meetings and structuring the discussions.

7. What are the groundrules of meetings?

To enable action learning set members to resolve real issues and develop as individuals, the following three basic conventions or ground rules have proved most useful.

i. Only One at a Time (OOAAT)

Only one person at a time in the set presents an issue. The others give attention and help, entirely for her/his sake. The space belongs to the problem presenter. Any personal material belonging to other set members is rigorously excluded from that space. For example, set members do not tell anecdotes, say 'how it is in my organisation', or give advice. In fact, other set members talk very little and learn the difficult discipline of not drawing attention to their own personal agenda in the presenter's space. The problem-presenter alone is in focus.

ii. Counselling Style (COST)

Even if set members can see a solution with great clarity they will refrain from giving advice or taking over the problem. Instead they will continue listening, quite often

Dos and Don'ts

Do

- Set an equal amount of time for each person
- Listen and encourage the person to talk
- Allow a minute or two after a person has finished to check they have said all they wanted to say
- Attempt to see things from the other person's point of view
- Ask questions which encourage thought and exploration
- Encourage the person to be specific when appropriate
- Support the person by giving good attention
- Respect and value their uniqueness and capacity to take their own decisions

Avoid

- Interrupting until the person has finished
- Imposing your own values, views, opinions, advice
- Being judgmental about the person's values
- Criticising, negating or trivialising what the person is working on
- Assuming that their situation is similar to ones you have experienced

allowing silence and asking questions to clarify the presenter's understanding, rather than their own.

iii. Safe to Admit Need (STAN)

Only in a group where it is safe to disclose ignorance, admit weakness and ask for help is it possible for the problem-presenter to learn at sufficient depth to develop as an individual. A primary objective of the facilitator is therefore to create an atmosphere where it is safe to admit need.

8. What happens between meetings?

To get the most out of action learning it is necessary to do some preparation for an action learning set meeting. The most important preparation you can do is to undertake the actions that you agreed to at the previous set meeting.

In addition, here are some questions to think about in preparation for each set meeting:

- What have I done since the last set meeting?
- What are the outstanding action points and why?
- Do I still see the issue the same way?
- What have I learnt from what I've done: about myself; about others; about the issue?
- How have my plans changed since the last set meeting and why?
- What are my next steps?
- What do I need from this set meeting?
- How can my colleagues help me?

9. What is needed for action learning sets to work well?

The success of the action learning set will be dependent on several factors in addition to the actual process itself. The group members of the set may discuss and identify amongst themselves what they think are 'trigger points' for them. In your first session, you will work together to identify and list these and agree an informal contract with each other.

Things you may need to consider, for example:

- Will I be able to commit to attending all of the sessions in this set? If not, how might the rest of the group feel about that?
- Some of the timings might be difficult for me, so how might the group feel if I am late for some of those sessions?
- What do I think or feel about individuals who do not implement the actions they say they would commit to?
- I tend to find it quite difficult to have open discussions of confidential nature in a group setting, so how can I address that with the group?

The role of your facilitator will be to work with you and guide you through these discussions and jointly agree some ground rules and parameters for working effectively as a group. The process is meant to be experiential and authentic, with a longer-term impact in learning and development, therefore agreeing this informal contract at the outset would help to provide maximum benefit.

10. Where does Action Learning come from?

Action learning sets are one technique within the wider field of action learning. Action learning is founded on the work of Reg Revans. In the 1930s Reg Revans was studying for a PhD in astrophysics at Cambridge University. He was working alongside eight Nobel Prize winners. None of them worked in his field, but he noticed that when they were faced with difficult research problems, they would sit down together and ask one another lots of questions. No one person was considered more important than any other and they all had contributions to make, even when they were not experts in a particular field. In this way they teased out workable solutions to their own and other's problems.

Revans was struck by how powerful this technique was. When he went to work for the Coal Board, he introduced the technique there. When pit managers had problems, he encouraged them to meet together in small groups onsite, and ask one another questions about what they saw, in order to find their own solutions rather than bring in 'experts' to solve problems for them. The technique proved successful and managers wrote their own handbook on how to run a coal mine.

This is how action learning was born. Some years later, Professor Reg Revans tested and formalised the theory which is now the cornerstone of many management and organisational development programmes.

Underlying beliefs and principles

Belief 1: **Learning starts with not knowing**

- We only become open to learning when we admit what we don't know
- There are no experts in those situations where there are no right answers
- Where there are no right answers, you must act in order to learn

Belief 2: **People who take responsibility in a situation have the best chance of taking actions which will make a difference**

- Work out what really matters to you, what it is you really want to do
- Make choices and take actions and then learn from this
- Keep it alive and moving

Belief 3: **Learning involves both programmed knowledge (what is taught and read) and questioning insight**

- Learning is not just about the acquisition of programmed knowledge
- Learning is about posing useful and discriminating questions in conditions of uncertainty
- Learning is about trying out unfamiliar ideas
- Learning involves risk and taking actions which might not work

Belief 4: **Learning should be greater than the rate of change**

- An organisation which continues to express only the ideas of the past is not learning
- Training programmes that teach us keep us proficient in yesterday's techniques. They do not tell us what to do when we meet a new opportunity

Further Resources

This booklet is based on information from:

<http://www.actionlearningassociates.co.uk/actionlearning.html>
www.eoeleadership.nhs.uk/downloadFile.php
www.prodait.org/resources/new_action_learning.doc
www.togetherfdc.org/SupportDocuments/ALSGroundRules.doc
www.actionlearningsets.com/php/news.php?id=4
www.bond.org.uk/data/files/als.pdf

Other useful resources:

The International Foundation for Action Learning: www.ifal.org.uk

This is the UK branch of this organisation which also has links to material on its American and Canadian sites.

Brockbank, A. and McGill, I. (2003) *The Action Learning Handbook: Powerful Techniques for Education, Professional Development and Training*, Abingdon: Routledge

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

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