Action Learning as an Adult Instructional Strategy

Overview of Action Learning

Although he is not generally named among great business or educational theorists of the 20th Century, Reg Revans pioneered Action Learning (AL). In their "Tribute" to Dr. Revans, Levy & Delahoussaye (2000) write that AL is

> Action Learning
> $$L = P + Q$$
> Learning arises from Programmed Knowledge + Insightful Questioning

"considered by some to be one of the most important ideas to have emerged in management and organizational development in the last 50 years." According to Levy & Delahoussaye (2000), Revans' theory incorporates elements of constructivism and "the roots of self-managed learning and empowerment."

Constructivism, as defined by Lorsbach & Tobin (1997), is a cornerstone of AL:

> "The constructivist epistemology asserts that the only tools available to a knower are the senses. It is only through seeing, hearing, touching, smelling, and tasting that an individual interacts with the environment. ... Constructivism asserts that knowledge resides in individuals; that knowledge cannot be transferred intact from the head of a teacher to the heads of students. The student tries to make sense of what is taught by trying to fit it with his/her experience."

These "roots" have caused Revans' AL theories to become wildly popular in the business world, especially among organizational development experts. Most notably, AL is a tenet of Team Learning, the capstone of Peter Senge's widely embraced book, *The Fifth Discipline*. In fact, Team Learning is simply an application of AL (McCann, n.d.). Veitch (2005) writes, "It's difficult to maintain a process of Action Learning outside of a team."

Over the course of nearly sixty years, Revans perfected AL in management development activities where "upward communication of doubt" could lead to "positive difference to the organisation's effectiveness" (Action, 2005). Revans was surprised, however, to learn that managers "were puzzled by the idea that they might be able to help each other" (Veitch, 2005). Despite its present-day popularity as an organizational development theory[1], Levy & Delahoussaye (2000) warn against limiting AL to its

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[1]Atherton (2003) writes, "...the [AL] label (brand) has been hi-jacked by a number of training organisations" that offer team-building activities but "owe little to the 'orthodox' approach [of AL]."

current business applications.

AL focuses on complex problem-solving. It is difficult to define[2], but AL is variously described as "a form of Problem-Based Learning" (Atherton, 2003); an extension of Experiential Learning (12manage.com, n.d.; Dick, 1997); and "'double loop learning' where [participants] not only receive feedback on their actions, but will find their underlying assumptions and mental models under scrutiny" (12manage.com, n.d.). AL's basis lies in participants' "willingness to recognize not what we know, but what we don't know" – "[b]eing aware of your own ignorance as a starting point for learning" – followed by "searching questioning and deep reflection," (Levy & Delahoussaye, 2000). Another critical component of AL is that "[p]articipants need to have some investment in finding the solution" (Atherton, 2003).

Revans developed AL as an activity for groups, or "sets," where "participants are able to raise difficult questions, discuss sensitive issues, and share their learning in a supportive environment, secure in the knowledge that 'what's said in the room stays in the room'" (Action, 2005). Atherton (2003) describes the AL "set" as a closed group of four to six individuals who

- meet regularly;
- work on the same problem (alá a task force) or have individual problems;
- present updates on their problems at each meeting;
- act as querants, consultants, and/or mentors to each other; and,
- each outline an "action plan for the next time period" at the end of his/her presentation to the group.

Hammond (n.d.) identifies several important prerequisite skills in a Learning Organization that are fundamental to AL set members – the abilities to:

- understand the culture of the organization;
- let go of old myths;
- notice new patterns;
- develop a clear and open perspective;
- generate energy and bring energy to the group;
- learn forever;
- create "safe" environments for others
- see what is coming and going in order to make faster choices.

Within an AL "set," Atherton (2003) maintains, "[t]he nature of the questioning is

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[2]Levy & Delahoussaye (2000) write "Revans would argue [defining AL is] counter-productive" to the theory.

regarded as central; it is open-ended and inquisitorial rather than adversarial ... to promote reflection and planning." Atherton (2003) also identifies the importance of an "advisor" to each "set": someone who is experienced with AL, but not necessarily an expert on the problem's subject matter. The role of the "advisor," who becomes less active as the "set" gains experience in AL, is to

• establish "procedural ground rules";
• "model the questioning process" and assist participants in developing their inquisitorial skills;
• promote "learning how to learn";
• direct participants toward available resources; and,
• deliver "just in time training," if needed.

Levy & Delahoussaye (2000) warn that the "essence" of AL "is to empower the learner, not glorify the teacher." Veitch (2005) admonishes that AL is about utility, "not about the preparation of an elaborate plan for future success." He continues,

> "Understand the problem, find a process that will improve things, try it, measure the change. Understand what that process taught you. Where you can you next apply effort to improve the result?" (Veitch, 2005).

The four necessary components of an AL activity are mutually exclusive; however, they do not individually constitute AL:

• "experiential learning;
• creative, complex problem-solving;
• acquiring of relevant knowledge;
• co-learning group support" (12manage.com, n.d.).

Dick (1997) describes AL in terms of Experiential Learning and relates AL closely to Action Research. He writes, "Action learning can be defined as a process in which a group of people come together more or less regularly to help each other to learn from their experience." Dick (1997) maintains that Action Research – "a process by which change and understanding can be pursued at the one time" – is better suited to educational settings, while AL is more appropriate for business. Dick (1997) writes "In action learning ... the learning and the activity used to be unique to each learner. With the increasing use of project teams in action learning programs, this is no longer true."

As indicated above, AL addresses complex problems by allowing participants to engage in creative, critical-thinking exercises that lead to new, strategic plans or maximum exploitation of resources and opportunities. AL also provides an opportunity to identify, and propose solutions for, underlying issues. An AL activity is characterized by

- emphasis on learning by doing;
- team setting;
- focus on organizational issues;
- participants assume problem-solving roles;
- requirement for team decision;
- formal presentations of results and plans of action (12manage.com, n.d.).

Michael Marquardt is considered the reigning expert on AL in business, and it is clear from his writings that AL is successful. Marquardt (2004) identifies six components of AL in organizational development:

- The Problem
- The Group
- Questions and Reflection
- Action Strategies
- Individual, Team, and Organizational Learning
- The Coach

The AL process is defined at 12manage.com (n.d.) as:

1. Clarify the group's objective.
2. Form the group.
3. Analyze issues and identify resolutions (actions).
4. Presentation of the problem (by its "owner").
5. "Reframe" the problem through questioning by participants.
6. Determine goals.
7. Develop action strategies.
8. Take action between AL sessions.
9. Repeat the cycle.
10. "Document the learning process" and "[r]ecord lessons learned.2.

<u>When to Use AL</u>

According to Atherton (2003), AL insists that the problem(s) being worked on must be real, in that no one knows the answer."[3] They should also be "non-technical, or at least non-specialist," because "too much specialisation limits the potential contribution of other members of the 'set'" (Atherton, 2003). Dick (1997) describes AL as "cyclic": Action –> Reflection –> Action. The first "action" is the problem-solving roundtable. "Reflection" in Dick's model identifies the period of time in which participants review the discoveries made during the roundtable dialogue session(s). Following the "Reflection" phase, participants enter a new "Action" phase, which is the manifestation

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[3]Problems for which an answer is known are identified in AL as "puzzles" (Atherton, 2003).

of changed behavior. Dick (1997) supports Revans' original thesis when he writes,

> "[A]ction is informed by intuitive theories. ... Critical review and planning
> are informed by conscious theories and assumptions ... derived
> deliberately from recent experience and used to plan the next experience.
> ... [A]ction informs reflection and is informed by it. ... [R]eflection
> produces the learning..."

Action Learning, therefore, is used in any setting where any individual(s) needs to solve
any problem(s) for which the answer is not known to him/her, and for which he/she
needs input from trusted compatriots.

Revans identified four "conditions for success" of AL:

• "A powerful motivation to do something.
• "An Active search for solutions that work.
• "Willingness to look without prejudice at suggestions for improvement.
• "Constant talking, argument, and discussion" (Veitch, 2005).

Proper development – design and content – of the AL activity "is crucial to its success"
(12manage.com, n.d.). AL failures occur when "sets" are dominated by one thought or
individual; when good facilitation is unavailable; when individuals fail to follow through
with outcomes; and, when accomplishing a task "can potentially overwhelm the
reflective learning process" (12manage.com, n.d.), a critical component in the cyclic
nature of AL.

An Activity that Illustrates AL

"Projector and Screens," from *The Fifth Discipline Fieldbook* (Senge, et al., 1994) is an
excellent example of Action Learning. The stated purpose is "To practice seeing the
collective mind in action; to see two polarized perspectives displayed and to learn to
disidentify with ordinarily rigidly held positions" (p. 382). In this activity, individuals
role-play as the "owner" of a significant problem and two or more points of view of the
problem.

In groups of three, participants will assume the roles described above. The problem-
owner "projector" will explain (project) a real-life problem to the other two individuals
(screens). The "screens" will reflect their points of view back to the "projector" to help
him/her identify potential solutions. The "screens" may even go so far as to assume a
stance or other dramatization of their points of view. They may not, however, identify
any of their points of view as their personal opinions.

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