

ACTION LEARNING

Action learning is a rich philosophy of learning and practice that offers a significant contribution to the fields of management and professional education and development, organisation problem-solving and performance improvement, organisation change and development as well as to action research.

Overview of Entry

This entry provides an outline of action learning's origins, traditions and key ideas.

Contemporary ideas and applications are illustrated before considering the particular relevance of action learning to action research.

Origins, traditions and key ideas

Action learning, as a coherent and named body of practice, was created and developed by English man Reg Revans (1907-2003) in the mid twentieth century, where he evolved his notion of action learning through his work in the coalmines and in the health services of Britain and Belgium. Influenced by his early training as a physicist at Cambridge University in the late 1920s, where he encountered Nobel-prize winning scientists meeting weekly, not to display their achievements, but to learn from one another through voicing the challenges and unknowns they were tackling, when coal pit managers had problems, Revans encouraged them to meet together on-site in small groups and, rather than draw on external experts to solve their problems for them, to ask one another questions about what they saw in order to find their own solutions.

Later, in Belgium, he introduced a process where senior managers learned through spending time investigating problems in areas unfamiliar to them.

Revans eschewed definition of action learning, saying that to define it was too simplistic.

However, he also argued that, in that action learning can be characterized by specific assumptions, objectives and an educational method, neither was it merely common sense, nor simply action that may or may not result in learning.

Assumptions, Objectives and Educational Method

Core assumptions that underpin action learning are that learning derives from taking action and asking insightful questions about urgent problems or enticing opportunities. Formal instruction and theory is not sufficient. External training, instruction or expertise is not relied upon, because existing codified knowledge, whilst it may be drawn from, may not suit the specific context of a particular problem. Processes such as action and feedback, asking fresh questions, learning from and with peers and creating a multiplier effect between individual and organizational learning are central to action learning.

Revans saw the objectives of action learning as follows:

- 1) To make useful progress on the treatment of some real problems or opportunities
- 2) To give participants sufficient scope to learn for themselves with others, and
- 3) To encourage teachers and others engaged in management development to help participants to learn with and from each other.

Based on a philosophy of action (praxeology), action learning is a challenging educational method that is much more than simply learning by doing, in that it engages participants in risk-taking experimentation and a degree of self-challenge, on the basis that a person cannot expect to change others or an organisation if they cannot change themselves.

Revans' Classical Principles

Though Revans resisted simplistic definition of action learning, there were consistent principles in the practice he wrote about, which have become widely known as Revans Classical Principles (RCP) (See Figure 1).

Figure 1. Core Elements of Action Learning (Revans' Classical Principles)



1. **A task-** a problem, concern or opportunity that needs action taken and is owned by group members.

Central to action learning is a distinction between puzzles and problems. Puzzles are those difficulties for which a correct solution exists and which are amenable to specialist and expert advice, for example, how to stop a roof leaking or what medicines might cure a particular disease. These neither need nor benefit from action learning. Problems, on the other hand, are difficulties where no single solution exists, where the context may be familiar or unfamiliar and where neither agreement amongst stakeholders nor certainty are strong. For example, how to reduce hospital waiting lists or how to speed up product development cycles. Problems are amenable to action learning because of its exploratory, collaborative approach that can incorporate diverse inputs, values and intended outcomes.

2. **Action:** based on the premise that action is the basis for learning and that no real learning takes place unless and until action is taken. Problems are ones on which the learners can take action, not merely offer diagnosis or recommendations to others.
3. **Peers** - a set of action learners: a group of people (typically 4-8, though this may be more or less) who care about the issue, have the power to do something about it and work together voluntarily in sets of peers.

Such a group, originally referred to by Revans as a set, takes responsibility for organizing themselves and develops their own capacity to solve problems. These peers are usually others with comparable issues and in similar organizational hierarchy positions.

4. **Questioning insight** is more valuable than formal instruction

Learning is understood to result primarily from inquiry, investigation, experimentation and reflection, rather than through formal teaching, instruction or access to expert knowledge. The search for fresh questions and questioning insight is seen as more helpful to assist set members to clarify the nature of their task/problem, to reflect on their assumptions about how they frame the issue, and to illuminate what is unknown as well as what is known.

5. **Profound personal development** resulting from reflection on action.

With the support, questions and challenge of peers within the action learning set, action learners review their experimental attempts to address the task, reflect on their actions, recognize and reframe their assumptions as well as receive feedback. Action learning aims at going beyond merely solving immediate problems. An increase in the knowledge and capacity to better adapt to change is the ultimate outcome. Action learning helps managers develop meta-skills such as self-insight, wider organization-political understanding and influencing abilities.

6. **Problems are sponsored** and aimed at wider organizational change as well as personal development. Where action learners are drawn from across an organization, action

learning can benefit both individuals and organization. Sponsorship by a senior manager is important to enable more junior staff to take action and influence change.

7. **Facilitators** have become a norm in much action learning practice, though they were not strongly advocated by Revans and are not employed in all variations of the approach (see below).

What action learning is not

Action learning is a term that is used with a wide range of meanings. Some simply equate it with experiential learning, such that any process that includes experiential activity is considered to be action learning. Revans was clear that action learning was not job rotation, project work, case studies, business games or other simulations, group dynamics, operations research, industrial engineering, work study or consultancy.

The Action Learning Formula

Revans formulated action learning around the formula, $L=P+Q$ where L stands for learning, P for programmed knowledge (i.e. existing theory) and Q for questioning insight.

Programmed Knowledge

The concept of programmed knowledge (P) relates to technical expertise, functional specialism, formal instruction, published theory and the syllabi of teaching institutions. Action learning's reservations over reliance on P derives from contextual characteristics: – time, setting, school of

thought, conscious selection by those who generate or disseminate programmed knowledge. As time and context change, so also does the usefulness and usability of P for the specific situation of new action learners. Yet, managers faced with change may incline towards a favoured tool, technique or well-remembered article or book to help to start their process of change. Whilst action learning incorporates a diagnostic phase (System alpha - see below), in which P may help frame the issue, to follow the guidance of such a source of P in an unquestioning way may prematurely narrow conceptualization, lead to mis- or partial diagnosis and would be unlikely to result in the amelioration of the problem.

Questioning Insight

Faced with a complex challenge to explore or a problem to ameliorate, for Revans learning always begins with Q – questioning insight.

Insight is an act of understanding that grasps the intelligible connections between things that previously have appeared disparate. As we attempt to make sense of new experience we do not yet understand, we ask the question, ‘what does this mean?’. Answers to such questions come in the form of insights, which are creative acts of understanding, of grasping and formulating patterns, unities, relationships and explanations in response to questions posed to our experience. Insight must be followed by evaluation and judgment in order to assess and verify the evidence. If we ask fresh questions, unfreeze underlying assumptions, and create new connections and conceptual models, this is questioning insight. Q challenges both the usefulness of programmed knowledge (P) to the current situation and the ignorance of the participants. Questioning others

both admits to lack of knowledge and increases the scope of the search for solutions. It also carries the potential for new insight into the current state.

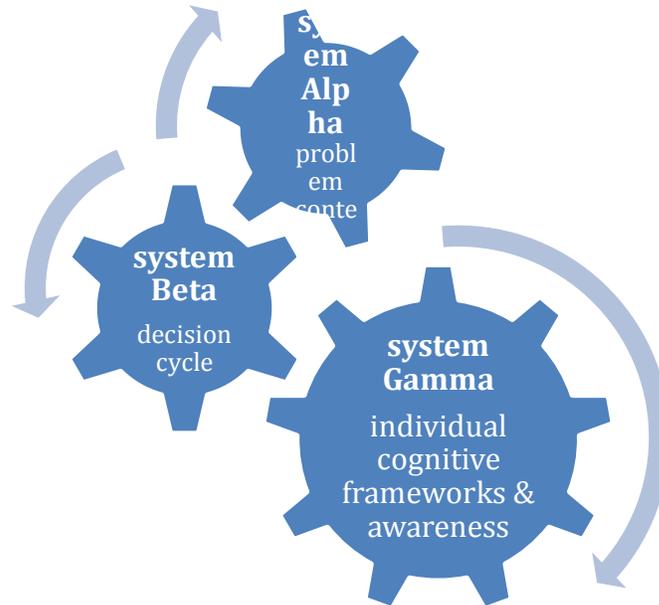
Philosophical Basis - Praxis and Praxeology

Action learning, as developed by Revans, grew from a mid 20th century disenchantment with positivism and prevailing cultural beliefs in the dominance of expertise, which fostered the conviction that, unless problems can be solved by a purely technical solution, there is more learning to be had through action being taken by those involved with an issue. Revans' key idea was a synergy between learning and action. In other words, praxis is fundamental to action learning in the sense that activity or work is essential to learning.

Systems Alpha, Beta and Gamma

Revans proposed a theory of action in terms of a science of praxeology, comprising what he called systems alpha, beta and gamma. In essence, system alpha focuses on the investigation of the problem, based on the managerial value system, the external environment and available internal resources. System beta focuses on the problem resolution, through decision cycles of negotiation and trial and error. System gamma focuses on the learning as experienced uniquely by each of the participants through their self-awareness and questioning. System gamma concerns the participants' cognitive framework; their assumptions and prior understanding.

Figure 2. Praxeology in Action Learning:
Diagrammatic representation of Revans' Systems Alpha, Beta and Gamma



The scientific method associated with system beta comprises the steps:

- Observation/survey involves collecting data for diagnosis and classifying what seems to go on.
- Theory/hypothesis generation involves suggesting causal relationships between those happenings; formulate courses of feasible action.
- Test/experiment involves taking action on the basis of those causal relationships.
- Audit/review involves asking if that action has gone as expected.
- Review/control involves rejecting, changing or accepting the emergent causal relationships; comparisons between expectation and experience; draw conclusions and plan another cycle.

Enactment of this five step cycle or scientific method (endlessly repeated) is a detailed description of the questioning and reflection that goes on within system beta.

The three systems, alpha, beta and gamma are not linear or sequential, nor are they entirely discrete (as illustrated in Figure 2). Rather, they overlap on important issues of learning, power and politics. They emphasize how action learning involves engagement with real issues, rather than with fabrications. The engagement is both scientifically rigorous in confronting the issues and critically subjective through managers learning in action. Systems alpha and beta focus on the investigation of the problem while system gamma focuses on the learning. The three systems are perhaps best understood as a whole, with interlocking yet overlapping parts.

More recent evolutions of action learning cycles include explicit attention to decision-selection of solutions, involvement of other organization stakeholders and questioning what assumptions underpin how the issue/problem is framed.

Examples

In relation to organization change and development, action learning has a long tradition of application to management and leadership development, both as the sole method and in combination with other interventions including one-to-one coaching and large group instruction. For example, a leadership development programme might incorporate individual action learning enquiries into the question ‘how do I improve my leadership capability?’ Other applications have focused on whole organization change or even, at a higher level of complexity, enhanced systemic practice, across a supply chain or involving multiple organizations, disciplines and

clients within a geographical space. Examples include such problems sponsored by senior management as:

- reduce wastage
- improve the quality of problem-solving
- learning to work collaboratively across professional and geographical boundaries
- improve rates of innovation
- promote collaborative learning across the value chain.

Contemporary Developments

Facilitation

Though classical action learning is ambivalent about the use of facilitators, in practice their use, also termed coach or set advisor has become widespread. The facilitator can play a variety of roles for the group, coordinator, catalyst, observer, climate setter, communication enabler, learning coach among many. Their role is to model the peer challenge / critical friend behaviors, to help the group establish ground rules and develop questioning, reflective and inclusive team practices. Good facilitation attends to the process of the group, rather than becoming drawn into the content of discussions or being the expert problem-solver. Facilitators have to be able to tolerate and interpret silence, ambiguity and conflict, as well as be active listeners who can summarize back to set members. However, action learning facilitation is not the same as group facilitation or team building because of the primary focus on learning. The action learning ideal is that a group grows to be self-directing and the role of the facilitator is deemed to be unnecessary.

Extending Ideas on Insight – Organizing Insight (O) and Inter-Organizing Insight (IO)

Advances in thinking about the role of insight, questioning and inquiry within action learning have led to concepts of ‘Organizing Insight’ (O) and Inter-Organizing-Insight (IO). O derives from the relationship between action learning and organizational learning and inquiry into the power and emotion within the organization dynamics in which action learning takes place. The action learning formula has been further extended to include the network or system-wide setting of multi-partner action learning, as found in supplier networks or public service inter-agency collaborative arrangements. This leads to a network action learning formula of $NAL=P+Q+O+IO$, where network action learning includes both organizing insight (within partner organizations) and inter-organizing insights (IO).

Action Learning as an Organizational Learning Mechanism

Action learning was originally formulated by Revans in order to sustain learning in organizations. As such an approach designed to realise the commitments to action and learning in relation to a specific problem it also holds the potential to act as a learning mechanism in the sense of being an organizational configuration, formal or informal, intended to develop, improve and assimilate learning. Correspondingly, the formal structures and processes associated with action learning include the disciplined application of the RCP elements noted above and, in particular, the group, the questioning and reflective process, and the facilitator. The informal structures and processes associated with action learning may include the spontaneous formation

of individuals as a group around a common problem and the group commitments to action as well as to learning in relation to the problem.

Action learning also meets the characteristics of ‘dialogic OD’ in that it works to enable dialogue between people as to what organizational problems might mean and how they might be addressed.

Varieties of Action Learning

A variety of interpretations of action learning have now developed internationally (see Table 1).

Table 1. Varieties of Action Learning

Action learning variety	Key ideas
Self-managed action learning	group facilitates themselves
Business-driven action learning.	priority given to business opportunities and results
Virtual action learning	group members engage in reflective questioning on-line, through methods such as Skype, tele-conferencing, email and virtual learning sites.
Action mentoring or coaching	cycles of action and reflection are pursued within one-to-one relationships such as mentor-mentee or peer-to-peer learning
Auto-action learning	Working alone, an individual uses a repeated set of questions to systematically structure their review through cycles of action, reflection and learning
Critical action learning	participants draw from critical perspectives to make connections between the power and emotional dynamics of their learning and their work experiences

Different varieties share most of the RCP outlined above, but key aspects differ. Firstly, the balance of priority between business objectives and profound personal learning varies, for example, with business-driven action learning, as its name implies, prioritizing business results compared to critical action learning in which learning, perspective transformation and changed practice are completely intertwined. Secondly, is the use of facilitators or coaches, which in the Auto- and Self-Managed Action Learning, have least weight and are advocated only temporarily or not at all. In contrast, in Critical Action Learning significant weight is placed on strong facilitation to help surface and challenge assumptions. A third distinction is the emphasis placed on group process as an experiential source of learning for participants, for example about team dynamics and skills such as chairing, collaboration and decision-making. In Critical Action Learning, group process is central as a source of potential learning about self, others and the organization, because of the way dynamics within a group so often mirror the power relations of the wider organization and society.

Application to Action Research

As a method that integrates individual and organisation learning, change and development, action learning has many parallels with action research in its concern with praxis and praxeology, and its philosophical grounding in theories of learning from experience, as practiced collaboratively with others through some form of action-oriented inquiry. These theories are influenced both by the assumption that we can shape our environment and also by a belief in the value of scientific method in the pursuit of improvement. Participants take responsibility for and control of their own learning and, so, there is minimal use of experts. The overriding value that

guides the action learning approach is a pragmatic focus on learning for the sake of more effective problem solving and organization improvement.

Action Learning Research

A recent development of action learning presents Action Learning Research as a new member of the family of action-oriented approaches to inquiry, such as Mode 2 research, praxeological inquiry, action research and collaborative management research. These new paradigms of research are providing alternatives to traditional research paradigms and Action Learning Research offers a contribution to practical, actionable knowledge.

See also

Mode 1 & Mode 2 Knowledge Production

Praxeology

Critical action learning

Further Reading

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