Continuing Professional Development Series No 1

Action Learning

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ltsn generic centre

Learning and Teaching Support Network

Continuing Professional Development Series

Welcome to the LTSN Generic Centre's Continuing Professional Development Series.

Continuing	because learning never ceases, regardless of age or seniority
Professional	because it is focused on personal competence in a professional role
Development	because its goal is to improve personal performance and enhance career progression

(Institute of Personnel and Development, 1997)

The Dearing Report stated that only with a strong investment in CPD can effective learning, teaching and assessment truly be developed. This series builds on that recommendation.

Action Learning

Mentoring

Supporting Portfolio Development

Supporting the First Year Experience

Supporting Student Retention

Critical Encounters: Scholarly Approaches to Learning and Teaching

This series is based on practical case studies taken from and easily applicable to, a range of contexts in higher education. The guides will be of use to colleagues involved in learning and teaching in higher education especially to staff and educational developers, and leaders of programmes that support new staff. The varied nature of the topics addressed enables the series to cater for a variety of needs.

Applications include
- mechanisms for supporting new and existing members of staff
- discussion foci for use within departments, schools and faculties
- strategies for tackling student retention
- models of developing the curriculum to widen access
- approaches to enhance the scholarship of learning and teaching.

The series editors are grateful to colleagues in LTSN Subject Centres and other senior colleagues who refereed this series, and of course to the authors for enabling its publication.

We hope that you will find these guides interesting and thought provoking. We welcome your feedback and any suggestions you may have for future work in this area.

Professor Brenda Smith
Head, LTSN Generic Centre

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Summary

This introduction to action learning is for teachers in higher education who are interested in supporting reflective practice, experiential and work-based learning. My aim is to encourage the use of Action Learning beyond its early adoption by Business Schools and Health Faculties, where reflective practice and experiential learning is well embedded, to a broader range of higher education courses and staff development programmes. I start by describing the approach and then provide examples of action learning used to support students and staff in a wide variety of learning environments. I go on to discuss the skills required by tutors and to raise issues and difficulties which may be encountered. There are many books and articles on action learning and this paper is based primarily on my own experience. I would urge those interested to follow up the suggestions for further reading outlined at the end of the paper.

Acknowledgements

Background

This section provides a personal background to the author's interest in and use of action learning.

I first came across action learning when I joined Brighton University Business School in the mid 1980s. My colleagues Tom Bourner and Ian McGill were exploring its possibilities and had introduced it into two postgraduate courses and as a support for staff development. It was within this latter context that I had my first taste of action learning when I was invited to participate in a new set [1] for staff. From the first, I saw its power both to support my learning and action planning and as a process for teaching in higher education contexts. It was after working on a Diploma in Management Science (DMS) and the novel Advanced Management Development Programme (a part-time management research-based course) that I began to see its possibility for use with teacher education. I used action learning as the core of the Postgraduate Certificate in Learning and Teaching in Higher Education, one of the first courses of its kind in the move to professional qualifications for teaching in universities (Beaty,1998).

In moving to Coventry University in 1997 I brought with me a firm conviction that action learning is a key element in supporting project management and personal development and I used it to create cross-institutional sets with staff involved in implementing the university's teaching and learning strategy. In much of

my work I have seen a strong link between action learning and action research. Whereas action learning effectively links reflection and action to create a development cycle for the individual, action research effectively links evaluation and development to create research which is both situated and immediately useful (Beaty and Cousin, 2002).

Action learning, in my experience, is particularly well suited to students whose studies are connected to a clear area of work. The recent focus on employability and transferable skills may, however, mean that action learning becomes as relevant to undergraduate courses as for continuous professional development. Colleagues have used action learning in support of sandwich programmes and have adapted it for use alongside problem-based learning. In what follows I leave the anecdotal and move to a more descriptive approach to introduce action learning. I do hope you find this introduction useful. It is only a taster and I do urge those who are intending to use the method to read more. I have included a short bibliography at the end. The book written with Ian McGill, in particular, is useful as a handbook for those using action learning and has a great deal to offer in relation to the skills involved. You can also read more about how we are currently using action learning at Coventry University by visiting the Coventry University, Centre for Higher Education Development web site (www.coventry.ac.uk/ched).

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[1] *The term 'set' is used in a precise technical sense in this paper. See section 1.3 for details.*

1. What is action learning?

This section gives a definition of action learning, situates it within the general area of experiential learning and briefly describes the basics of the method.

1.1 Defining action learning

Action Learning is a continuous process of learning and reflection, supported by colleagues, with an intention of getting things done. Through action learning individuals learn with and from each other by working on real problems and reflecting on their own experiences. The process helps us to take an active stance towards life and helps to overcome the tendency to think, feel and be passive towards the pressures of life. (McGill and Beaty, 2001)

Action learning is an approach to learning and development that uses a group process to support the individual in learning from experience. This formalised group process is a powerful spur to action and provides both support and challenge to the individual in undertaking a project. The project an individual chooses to work on can be primarily for personal development or it could be a tangible external project. As action learning is built on the architecture of reflection, the external type of project will inevitably lead to learning in relation to issues of personal capacity and emotional involvement. Similarly, as action learning is also built on the premise of taking action then a personal development project will lead to new experiences and growth of capability. Thus for action learning, the internal world of thought and feelings, and the external world of action and experience, are inextricably entwined and also are both areas for effective learning. This is why mature adult learners and areas of professional development have been the first to take on this approach to course design. It is also why organisations which are concerned to harness the knowledge and experience of their staff have used this process to support strategic projects. If you want to read more about the history of action learning contact the International Foundation for Action Learning.

1.2 Experiential learning

Action learning is based on an experiential learning cycle (Kolb 1984, Pedlar et al. 1986). In this cycle, (see figure 1) experience leads through reflection and theorising to planning and further experience. This learning cycle, which is also a problem-solving cycle and a management cycle (Bourner et al. 1992), leads to learning and development. Figure 1 shows the action learning cycle moving from an area of action through reflection on experience which is supported by colleagues within the action learning set. This leads to theorising which, as well as happening within the set, can be supported through other forms of study. Then follows a phase of planning which is again supported by the action learning set where each participant will leave an action learning set meeting with a list of action points which they have decided to work on between this and the next meeting. In pedagogic terms, the processes which are supported by a formal traditional course of study are primarily in the theorising area.

Content is the focus of the work tutors do with students. Reflection and particularly planning future action are left as areas for independent work. The application of theory to an area of practice is often only available in simulated form and so the development of complex skills within a real-world context is left to be done after the course is finished. Many such courses use projects in order to bridge this gap between learning about an area and applying the learning. Within action learning, a real-world project is the start of the process and an essential element of it. Within action learning, the set process explicitly supports reflection and action planning. As we will see later, this offers a new challenge for course designers as in any course based on action learning principles, content is placed in the service of learning from experience rather than constituting its precursor.

Figure 1: The Action Learning Cycle

Action as the basis of experience in a real context.

Reflection supported by the action learning set.

Theorising within the set and also between set meetings through further study.

Planning including identifying areas for study and next actions to take.
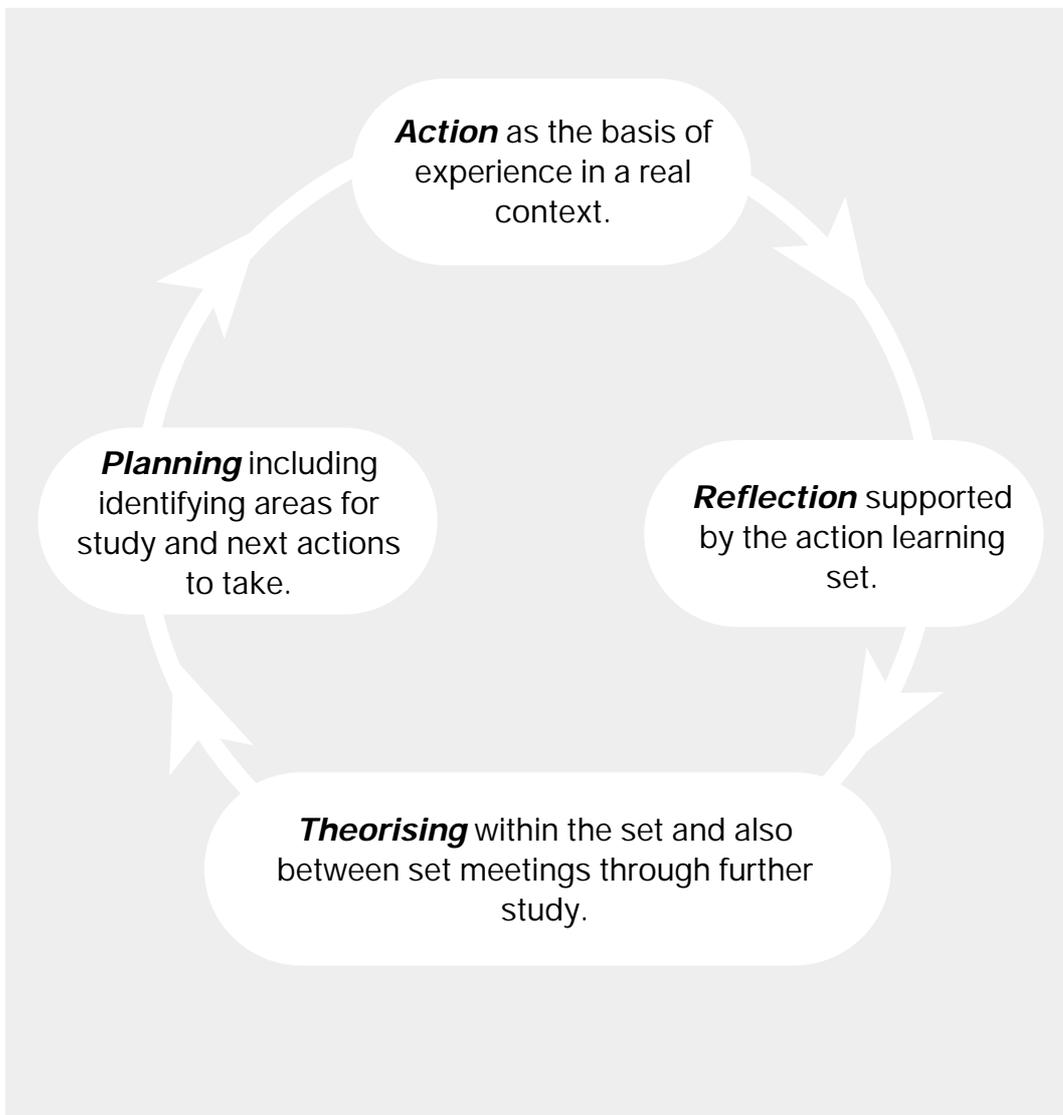
1.3 How action learning works

In an action learning programme, groups are usually made up of between four and seven participants called a set. There is usually a facilitator called a set adviser. Although the language of set and set adviser can appear as jargon, in my opinion, it is necessary to alert participants to the specific way of working which is different from a general group discussion and is the essence of its effectiveness. The simple idea of having individual time for focused attention on exploring issues and action planning imposes a very different discipline on participants and rhythm for the group work. The set typically meets once or twice a month over six to twelve months for meetings which last between two and seven hours. The exact pattern will depend on the nature of the projects and the programme, the participants' availability and practical issues relating to the size of the group. As the process is predicated on each member having time to work on their particular project, set meetings with seven people will take longer than sets with four participants. The rhythm of the meetings is also important to the choice of project, as it would be no good working on an area of experience which did not have some relationship in time with the opportunity for meetings. If a work project is likely to start and finish within three weeks it would not normally lend itself to an action learning process. Similarly, the choice of project needs to be appropriate `to action learning by being complex rather than something that a simple discussion with an expert might solve. (The focus is on a problem with potentially many solutions rather than a puzzle which has a right answer.)

The main features of action learning are
•   Collaborative learning – it is essentially a group based process
•   Projects are linked to the real world of experience either for personal and/or organisational development
•   Action planning and evaluation are emphasised as personally constructed rather than given by an expert
•   It uses processes which enhance development of interpersonal skills.

Action learning uses a group process to specifically support the reflection and the action planning parts of this cycle. Each time the action learning set meets participants reflect on their project and plan future action. Thus the set is the support for reflection and the challenge to act. Over a period of time this cycle induces learning from experience and is far more powerful than leaving learning from experience to chance.   To act on this learning creates opportunities for development and change. Taking part in action learning, therefore, requires commitment to moving on and, equally, to support the learning and development of others.

1.4 How does action learning differ from other similar group processes?

Action learning is based on group-supported reflective practice and the action learning sets are indeed a support group but the process involves more than this. Essentially the action learning sets should be seen as part of a process which crucially involves the action phase that happens between set meetings. The reflection on progress and learning within the set meeting leads to new action planning but experience is the important element which feeds the reflection and the learning. Action learning is also different from quality groups as it focuses on individual learning supported by a group rather than institutional learning through group discussion. Although action learning is very much a support for individuals it also involves challenge – the challenge to plan action and to move on. Development and learning go hand in hand here and the process does challenge people to change. Some people have felt that the skills involved in set facilitation are like counselling skills, as they are non-judgemental and humanistic in flavour. There is however an important difference from a counselling session and although the skills of active listening and open questioning are the same, there is no intention in the set to peel away layers of personal meaning. Rather, the intention is to learn from reflection on experience in order to undertake action – the focus is more pragmatic and the power remains with the set member rather than with the set facilitator. Nevertheless, although counselling is not on offer (nor are the skills likely to be in the set except by chance) many people have felt that stress has been reduced by membership of an action set.

This section has given a basic overview of action learning as a method and demonstrated its link to reflective practice. It has shown how the basis of action learning through use of the set process is a powerful engine for supporting learning from experience and effectively linking learning and action.

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2. Why is action learning so powerful?

This section reviews educational ideas that are currently informing higher education practice to illustrate why action learning can be so successful. It includes a discussion of deep approaches to learning, orientation, fear of failure, learning styles, stages of development and constructive alignment.

2.1 A deep approach

Research in Sweden and Britain in the late 1970s and early 1980s looked at student learning from the point of view of different approaches that students had when studying. A basic distinction was between those who took a deep approach and those who took a surface approach (Marton et al. 2000). The distinction is about the intention of the learner. In the deep approach the learner is intent on understanding a message in a text or making connections between experience and new ideas. In the surface approach the learner is simply trying to gather information one bit at a time: 'now I must remember this and now I must remember that'.

Action learning is essentially concentrating on what is significant in experience. It asks, 'What did I learn from that experience?' 'How can I make use of that observation in what I decide to do next' and so on. It is difficult to imagine how someone with a surface approach would react in a set meeting. I suspect they might not see the point of it. Action learning is essentially an opportunity for deep learning.

2.2 An intrinsic orientation

My research at Surrey documented changes over time in students' orientation to study. I described a typology of orientation types (i.e. not types of students, as each student demonstrated a dynamic mix of orientations.) These were: vocational orientation, academic orientation, personal orientation and social orientation (Beaty et al. 2000). The first three types could also be either intrinsic or extrinsic. The intrinsic orientations are where the course was seen as an end in itself, for example for vocational orientation and as a training for a job. Those with an extrinsic orientation saw studying as means to an end, for example for vocational orientation and to gain a qualification. The important point was that if one knew a student's orientation to study, their study patterns could be anticipated.

Action learning stimulates an intrinsic orientation because it centres on the person and their own learning needs. No one in a set should be working simply for the sake of the examination system. This does not mean that they do not care about the results of their work outside the set. On the contrary – results in the real world are the test of a successful process. Action learning helps people to make a difference both to themselves and to the world in which they live. It is not a process, however, which encourages procrastination or doing something for the sake of an external pressure. It would be interesting to research into the orientations of those on action learning courses in higher education and to see how these might change over time. I hope and expect that action learning would support a move from an extrinsic to an intrinsic orientation to learning.

2.3   Fear of failure

A good deal of research on student learning has been concerned with the anxiety that the assessment system brings to students and the problems that some students have with poor performance under pressure. Fear of failure is also a strong motivator and some students work hard due to this motivating force. Overly strong anxiety however is debilitating (Entwistle and Wilson 1977).

Action learning is clearly of great use here. In action learning sets we work with the feelings and not just the content of a person's learning. The set can help to put a situation into perspective and to relieve the anxiety of an individual working alone on a difficulty. The motivation which comes from set work is unlikely to be fear of failure, but what does it feel like in practice to come back to the set with a failed experiment or an action point not done? Is the set supportive when things go wrong? This must be so, for a set works with what is there and helps to move towards what can be. The set members are not usually intimately connected to other set members' issues and therefore are unlikely to induce test anxiety. But as I write, I am questioning whether for some people going to a set to report on action points does in fact have a tinge of this fear of failure. It will depend on the balance between challenges and support in the set and on the set members' ability to empathise with the presenter's emotional state at the time. This points to the importance of expert facilitation.

2.4 Learning styles

Is action learning more likely to help some people than others? How does it fit with different preferred learning styles? In fact the four styles of learning identified by Honey and Mumford (1986) match the four elements in Kolb's action learning cycle. One might expect that people whose learning style profile was strong on action and reflection to take most willingly to a structure which clearly emphasises these, although the strong idea behind action learning is to encourage individuals to move through all the stages of the cycle.

In one of the earliest programmes using action learning at University of Brighton we used an exercise based on learning styles with our participants at an early residential. The results implied that a set is usually most useful to individuals when different learning styles are represented within it and least successful when the individuals have the same learning styles. This is so, despite the mixture of styles often causing discomfort. One set member commented after the exercise that it had helped her to understand why she found it so difficult to work with a fellow participant – their preferred learning styles were so different and yet if they did manage to communicate, the result was especially creative. People with different preferences in learning style and from different areas of experience often make the best set participants precisely because their line of thought provokes from each other the most challenging and enlightening questions.

2.5 Stages of development

Perry's scheme of intellectual development in the college years described students who believed in right answers – a black and white view of the world (1970). If students have this view and believe that the lecturer has the right answers and that their job is to transmit the right answers into the head of the student, then they are unlikely to understand, never mind value, the facilitator within an action set. Perry's nine-point scheme shows movement towards the idea of relativism and then to a personal commitment within a relativist framework. It would seem that action learning lends itself to this committed view – that although I recognise many other views and find it useful to understand and debate them, in the end it is my own decision what to do and how to further my project. In my experience, action learning can help people to come to this view of themselves in relation to learning but there is sometimes resistance on the way. Trusting the process to yield useful results can be a trial for some participants in action learning and thus create difficulties for the facilitator. I have heard comments like 'why don't you just tell me what is the right thing to do and then I can get on with it'. In an action learning set a clash between the expectations of student and tutor (participant and facilitator) is self-evident in the process. While students in a lecture may be valuing and understanding what is said in inappropriate ways, in an action learning set this disjunction is immediately obvious.

2.6 Constructive alignment

The appropriate use of action learning in course design is a crucial element in its outcomes. It is difficult to graft an action learning process onto existing courses mainly because to do so makes the course exceedingly expensive to run. Rather, action learning becomes a core process and other teaching methods are added to create a fully functioning whole. John Biggs's concept of constructive alignment is useful here.

A good teaching system aligns teaching method and assessment to the learning activities stated in the objectives, so that all aspects of this system are in accord in supporting appropriate student learning. This system is called constructive alignment based as it is on the twin principles of constructivism in learning and alignment in teaching. (Biggs, 1999)

Constructive alignment involves an appropriate linking between intended learning outcomes, teaching and learning processes and assessment. In using action learning there is a strong imperative for clear areas of experience to be available. Participants need to be committed to learning from this experience and there must be possibilities for stable group membership over a period of time. Apart from where there is a clear area of theoretical content, which is necessary for the course, this is often best dealt with in a resource-based learning mode where

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students can access the information as and when they need to study it in relation to work on their project. Similarly, portfolio development or project reports are often the easiest form of assessment to align with action learning processes. Self and peer assessment are also realistic within this mode of working where responsibility for action planning is a required part of the programme. Thus, an action learning programme fits well with areas of professional practice where professional development is predicated on the need for self-evaluation and team working.

Section 2 has reviewed a number of educational concepts which give a useful backdrop to understanding the power of action learning and its relevance to higher education. The resonance of action learning to important educational ideas helps to explain why this method is becoming more popular in meeting the current challenges facing higher education teaching and learning.

3. Using action learning in higher education

This section outlines different ways to use action learning in undergraduate and postgraduate courses, for continuous professional development and for staff development in higher education. A brief discussion of online support for action learning is introduced.

3.1 Support for placements and projects in undergraduate studies

Because action learning is based on an experiential learning cycle, any course using action learning as a core process needs to identify what is the area of experience that will be used. Particularly fruitful areas for the use of action learning, therefore, are in relation to work-based learning such as placements and project work. In these areas, undergraduates are dealing with experiential learning and need to link their formal theoretical study with an area of practice. Action learning sets can provide the opportunity to individualise the learning but retain the group process often so vital for student engagement. Here also, the move from teacher of content to facilitator of learning is more obviously consistent with the design of the course. Action learning sets can support the problem solving that students find necessary in analysing the complexities of real-life experience. At other times it can raise their awareness of links between their studies and the practical area of project or supervised work. Without such support, students may find these experiential learning experiences separate and disconnected from their formal teaching.

Action Learning sets support placement students very well as it keeps them tuned in to their cohort at the University. They can talk about their experiences and relate it back to the course – it's a way of supporting the link between theory to the practice. Without the set it would be too easy for them to forget the theory until they return to University. The set also helps them to realise that other students have problems in their placements – it can be a lonely experience otherwise. Tutors can't always help – it is better coming from a peer group. (Course leader on Business Studies four year degree)

3.2 Postgraduate and continuous professional development courses

Where students are mature working adults taking courses for professional development, the neat fit between action learning and the aims of the programme is immediately obvious. A traditional didactic course rarely supports these learners in transferring their study into developing their practice. Action learning, however, will support exactly that transfer. The difficulty for professional development programmes is often in the basic design of the course because it is very expensive (in time) to graft action learning onto a traditional programme of lectures and seminars. Instead, many postgraduate or post-experience courses use action learning as the key process and then deliver the theoretical content by other means. For example, a novel use was made of subject experts in the Diploma in Management Science (DMS) at Brighton. The basis of this course was a client-based

project and the action learning set was allocated a certain number of hours from a tutor for each assessed area of subject content. The course group was allowed to negotiate how and when the content was delivered to them. In this way they addressed the subjects when they were most ready to learn them.

The action learning sets allowed students to work as a team in constructing their study pattern. They were empowered to ask for what they needed and the set work helped them to identify this. It was a very different way of working for the lecturers too and everyone had to get used to it – but the results were more rewarding for everyone in the end as the students were more motivated to learn – they knew why they wanted to know something – they questioned us instead of passively listening to what we imagined they needed to know. (Tutor on action learning programme)

3.3 As a support for research and research degrees

Students taking research degrees frequently find themselves alone and in need of moral support. For the content of their studies supervision should be sufficient and yet at times the difficulties and the block on progress can be daunting. A group of students, each with their own project, can be supported very effectively through action learning. The sets provide the structure in which they can reflect on their progress and talk through issues including those relating to their supervisors in a way which helps to

problem-solve and plan the next course of action. In a similar way any researcher can find action learning to be an effective motor for their own development and for the progression of the research. My experience with action learning for research support, through the research degree at Brighton and with staff undertaking action research projects at Coventry University, has convinced me that this is an effective way to support research of many types. Even researchers who have very disparate projects can benefit from a monthly action learning set to review progress and plan next steps. It forms a useful adjunct to more content-led supervision and can release the supervisor or other team members from dealing with the complexity of how the research fits in to the life of the individual researcher. While the set colleagues remain non-judgemental and separated from the project the supervisor is inevitably more involved. This relationship can therefore seem an inappropriate place in which to declare one's confusion or issues of personal relationship with the project. This is exactly the area in which action learning can be most useful.

The set is a good way to project plan. It means that the supervisor is doing more work on the actual content of the research and the general progress review and problems blocking progress can be dealt with in the set. Part-time research degrees can be very difficult to manage and it helps to be part of a group and feel that others are having issues of time to deal with. (Member of a research set)

3.4 For professional development of teachers

Many universities have postgraduate courses for academic staff to develop their teaching role. Action learning has been found to be a very useful process in these courses precisely because it can support in-service learning so effectively. Many staff new to teaching are coping with a complex array of different issues. An action learning set that gives them time, in a supportive environment, to reflect and plan for change can be an extremely powerful development tool. At Coventry University we have used action learning not only for new staff but also for groups of experienced staff who are building their portfolio for assessment via a fast-track route to the teaching qualification. They invariably benefit from reflecting on their teaching practice with other staff from across the university and feel the benefit of being part of a wider community than their usual group of subject based colleagues.

This first year of teaching was quite a strain. There were times when the action learning set was hearing more about my stresses in the department in settling in with colleagues than anything to do with my teaching. It was good that they listened though because actually those stresses were affecting my ability to do the job. I took an action point to talk it over with my Head of Department and it all settled down in the end. (Participant on a course for new lecturers)

3.5 For staff and management development

Action learning can be used for staff development purposes wherever there is a group of staff willing to commit time to the process. It does not need to be attached to a formal course to be of use as it is very suited to more general periodic continuous professional development. Because it is project focused, action learning can have wider benefits to the university as well as personal benefits for staff. Managers have found that it helps their ability to learn management skills and also to cope with the many difficult situations they face. They can be safely vulnerable due to the confidential nature of the set process. They can find that the confidentiality offered within the set allows them time to consider alternative courses of action before talking to a line manager or a staff member in Personnel. In particular, action learning is very useful to help extend induction for newer staff or for those who are new to the role of management.

I found the set useful and supportive and now would like to continue as it helps work on things that are difficult management issues. (A manager)

3.6 Action learning at a distance: using virtual learning environments

Action learning is often characterised by the proximity and close relations that become a feature of set membership. Recently however the growth of work-based learning and distance modes of communication through networked learning has encouraged experimentation with remote teaching and learning processes and various groups have tried action learning at a distance. Usually this involves the continuation of a set relationship, which began face to face, through an online discussion forum. This work is currently the focus of a research degree project at Coventry University and publications will be available during 2003.

There appears to be a lot of scope to consider aspects of action learning that can be facilitated online and especially for those in sets who have difficulty meeting due to full-time working or who are studying at some distance or even overseas. It is interesting that a process which has been seen to involve important areas of interpersonal communication skills is also increasingly making use of new technology.

Section 3 has given examples of how action learning is currently being used across higher education and ways in which it is developing. The current opportunities of new technology offer ways in which action learning can develop for the future.

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4. The skills and attitudes required by staff and students

This section aims to describe the attitudes and skills required by staff and students to make a success of action learning. It provides the basis on which staff might decide on the appropriate level for action learning within a course and the training involved for tutors and participants. It focuses on set membership and set facilitation.

4.1 Being a set member

Where participants have strong interpersonal skills of active listening, open questioning and awareness of body language, then action sets get off to a very good start. They can quickly become self-facilitated if this is the case. I have found that staff and students in higher education differ a great deal in how comfortable they feel working in small groups with the action set process but that the process itself does develop these important transferable skills. At the very least, action learning requires you, as a set member, to

- be willing to attend to others when it is their turn to present an issue
- actively listen and not speak over other people
- allow time for others to reflect and not always fill a silence
- allow the presenter to own their own issue and avoid passing judgement or offering your own solutions to someone else's action plan
- be prepared to commit to being an active member of the set for the duration of the agreed time span

- maintain the confidentiality of other people's issues between set meetings
- attempt to undertake the plans that you form at the end of your session in the set
- reflect on your progress and plans in order to learn from experience
- trust the process and act within it in good faith
- collaborate with others in the set to make it work as well as possible for all members.

4.2 Facilitating action learning sets

The role of the facilitator in an action learning set is to look after the process. Facilitators may need to attend to administrative details in setting up the set and organising space for meetings and early contacts between the group, but many of these functions can be delegated or shared among set members. The crucial role is within the set meetings where the particular structure of a set must be maintained in order that the group does not become a mere discussion group. Ensuring that each presenter has sufficient time, and that there is a focus on reflection and action planning are the key facilitation functions. Beyond this, the facilitator can mirror good questioning and listening skills to model an effective set process. If the members of a set are inexperienced in interpersonal skills there will be more work for the facilitator in making what are called 'process interventions'. This is where the facilitator interrupts the flow of discussion to suggest that the focus is straying from the presenter's issue or to point out that the set members are not allowing the presenter

time to digest or consider ideas before moving on. In this way the set facilitator is managing the effectiveness of the set process as it relates to the presenter. This, of course, must be handled carefully, and a wise facilitator will not make too many interventions of this sort as doing so can both interfere with the flow of interaction and create anxiety in participants which inhibits participation. On the other hand if participants are all talking at once or taking over the issue from a presenter, it is imperative that the facilitator intervenes to get the process back on track. A lot of this work is subtle and requires skill and experience. Facilitating an action learning set well is not simple and will be more difficult if the set members themselves have poorly developed interpersonal skills. The basic techniques include

- helping to set ground rules so that essential agreements such as the confidentiality of other people's issues is assured
- time keeping in order to move from description of experience through reflection and identification of important issues to action planning
- facilitating learning through allowing reflection by adopting an open style of questioning
- balancing support with challenge so that maximum spur to development and learning is achieved
- reviewing the process so that participants recognise their development over time in relation to their progress on their project and in learning the skills involved in action learning
- withdrawing. The facilitator will make most impact when he or she moves from

initially controlling the process to sharing responsibility with the participants then withdrawing to allow the set to be self - facilitating. The aim should be to build skills and awareness within the set so that over time, the facilitator becomes redundant.

There is not space in this short article to consider in detail the skills involved in facilitation. There are a number of useful publications which do this and which are detailed in the further reading section. The main point to emphasise is that action learning set facilitation does require high level skills and it is not something that anyone can do well. It is possible however to learn these skills and techniques and most people with moderately well-honed interpersonal skills can learn to be an action learning facilitator. It is perhaps the intention and belief in the process which is the crucial requirement. A brilliant communicator who is used to didactic teaching practice might experience problems in learning to be an action learning facilitator as the skills are not transferable, whereas a personal tutor specialist may find their well-honed listening skills very useful in working within a set process. It is not an easy option to support learning in this way but it is very rewarding. In the next section, I turn to some of the issues that face us in using action learning in higher education and address some of the concerns.

This section has briefly introduced the roles of students and tutors, set members and facilitators in using action learning. It illustrated the attitudes and skills which are required by and developed through use of action learning.

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5. Issues in using action learning

This section briefly discusses issues that will be of interest to tutors in considering the use of action learning. The section includes course design, tutor and student roles and assessment issues.

5.1 Course design and time

Action learning is a useful process alongside other teaching and learning processes within a course of study. It is particularly useful in support of learning from complex experiential areas and for post-experience or postgraduate courses. It is, however, a time-consuming activity for both learners and teachers and so is best seen as a core activity, with other teaching and learning activities around the outside to supply what action learning sets and practice do not provide. Courses designed for action learning will often require either resource-based learning provision or intensive workshops for input of theoretical content. An action learning set should allow at least 25 minutes per participant at each meeting and if there are more than four participants it is wise to add at least half-an-hour for slippage or for comfort breaks within the session. A typical action learning set therefore lasts for three hours for five participants and full day for seven participants. Similarly the costing of staff time should not be underestimated.

Although very effective, set facilitation is exhausting work due to the concentration required to handle the set process well and this can be compounded by inexperience or where members have low levels of interpersonal skills. The payback is that set facilitation is endlessly interesting and rewarding.

5.2 Facilitation and tutor roles

In a formal course of study the facilitator will be a member of staff who may also have other roles within the course, such as a workshop leader or assessor. These multiple roles can conflict and can lead to confusion for both students and staff about the nature of the role taken by the tutor as set facilitator. I have found that it is important to face this issue squarely at the beginning of the set and to have a ground rule that conversations about the structure of the course etc take place outside of set time. If something comes up during the set meeting that requires tutor explanation, it might be better to take this as an action point to discuss with the tutor afterwards rather than let the set meeting turn into a tutorial or a lecture. This discipline is hard to maintain and I have found that when it slips, it is usually to the detriment of the set. If this happens too often the set quickly becomes a group tutorial and not action learning.

5.3 Voluntary and compulsory set process

One feature often deemed essential to action learning is the principle of the voluntary nature of set membership. Within a course of study however, students rarely get the opportunity to choose the mode and structure of the teaching and learning methods and so can find themselves compulsorily attached to a set. This can be destructive to the process, especially if one or more members are reluctant or hostile to the process. I have found that it is important to set a ground rule that if after two meetings a member is uncomfortable with the process then they can opt out and I will find an alternative method for them to study the course. This has only very rarely been necessary but is a useful safety valve.

5.4 Action learning and diversity

Action learning lends itself to groups who can meet on a regular basis for an extended period of time. This may prove difficult for some people and the ground rules established by the group will need to take into account access issues and provide appropriate support for provision for disability. The tendency for a bonding effect among members of action sets and the focus on one person at a time can be very helpful in working with diverse needs. There will always be some issues, however, that are unanticipated and which will need special adaptation within the working of a set.

One issue that is of great interest, and for which there is little written guidance, is the extent to which action learning processes are culturally defined. There is a literature on cultural differences in relation to interpersonal communication and as a fairly intimate approach to group working, action learning may be more difficult for some groups and individuals. For example, in my experience (as a woman set adviser within mixed gender sets) I have often found women to be more at ease with disclosure of their personal attitudes and issues than men. The level of disclosure can also be culturally defined, and there may be issues for set facilitators in being sensitive to these cultural and sub-cultural differences within the set. Certainly it is my experience that different sets build different norms in relation to the amount of disclosure and this can usually be accommodated. It is also true that different disciplines will have their 'usual' forms of teaching and learning whereby the action learning process will be more or less innovative. The development of ground rules and discussion of these in a review can often help to establish a comfort zone for all members and enhance understanding of preference and difference.

5.5 Action learning with younger undergraduate students

Although action learning can have its place in any course or for any group of adults it may be more difficult to use with those students who have less connection with the world of work. The action part of the

reflective cycle can be study and research as easily as it can be work experience, but there are more examples of effective use of action learning with mature groups of learners and with those who are deliberately integrating study with work. It may be that for some groups of students and for some courses, a related course focused on problem-based learning, where the case example is constructed by the tutor rather than being based on students' own experience, is more effective. The group process is then centred more on working in a team to support learning from a joint project rather than working as a set to support different individual learning projects. Indeed, it is likely that the skills learnt through problem-based learning would transfer very well into action learning-based programmes later in a student's career, because the philosophy of both types of curricula design are based on related philosophy and theories of learning and development. (For more on problem-based learning see Savin-Baden, 2000.)

5.6 Assessment

Just as the course design has to change within an action learning programme, so too will assessment. The types of assessment most used in action learning set programmes are portfolios, project reports and reflective documents of various types, such as statements of relevance, critical incident analysis or diaries (see for example Bourner et al. 2000). These methods are clearly more aligned to the nature of such a programme than traditional examinations or essay type course work. There is often also

a strong inclination towards self and/or peer assessment. This again takes into account the fact that action learning always involves an experiential zone within it and thus the learning and the assessment of it will naturally include other people and the need for a professional style of evaluation and reflexivity.

5.7 Evaluating action learning

Although feedback on action learning programmes is usually very positive there are occasions when this form of learning does not suit particular individuals or groups of students. I have found that the important variable is the tutor's attitude to the method and to some extent their experience. Not all lecturers make good action set facilitators and if a facilitator is ambivalent the students will sense this attitude very quickly. As action learning is usually unfamiliar to students, they need, above all, to trust the process and to give it a good try before giving up. This therefore demands that the tutor projects a positive attitude. The biggest problems come when the participants of a set do not commit the time to coming, for example by turning up late or not at all. This can disrupt the set process very considerably and is the reason why setting ground rules at the beginning is so important. When ground rules have been negotiated then reviewing the set process is much easier as there is a framework for the review. The second issue is that confidentiality usually prevents discussion of the content of set meetings outside of the set. This means that evaluation and review must be restricted to the set process.

Occasionally individual sets have been a bad experience for an individual and in this case there must be someone whose responsibility it is to hear the complaint. I have had only one experience where this was a serious problem. As a course leader I had a complaint about a set adviser from one individual. It was a serious complaint and I was surprised as the tutor concerned was very experienced and others had gained considerably from the adviser's facilitation and tutoring skills. It turned out that the participant had various personal problems and had experienced the action set as counselling. I learned from this that action learning, while useful for dealing with many issues, should be carefully distinguished from a counselling session and that set facilitators need to pick up early on participants where advice to see a counsellor would be useful.

For action learning programmes, it is useful to build in an interim review of the set process as a 'within set' process which will review ground rules, participants' views on the set process and their progress with their learning project. This review of the set process is useful after about three meetings to refine the working of the set and then again at the end of the agreed series. The focus of this review should be on evaluating progress with learning and reviewing the helpful and less helpful norms of the set in order to make future meetings more productive. For formal courses, there will also need to be an evaluation of the role and effectiveness of action learning for the course through more normal procedures of feedback questionnaires, course consultative meetings etc.

Action learning is not always an easy option to choose in designing a learning programme. Experience has shown that some people benefit more than others and some projects are appropriate and others not so. This section has discussed some issues that arise out of using action learning and has pointed out a number of important design issues to take into account.

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6. Lessons from using action learning in practice

This section is unashamedly prescriptive in setting out advice for the use of action learning in higher education.

Finally, here are some important guidelines which come from my experience in using action learning within a large number of arenas within higher education

- Try it as a participant before you try to facilitate a set for others
- Redesign your programme – don't graft action learning onto a fully functioning course
- Train and support action learning set facilitators
- Consider your policy on voluntary participation
- Think about how you will support the resource/content needs of projects
- Don't keep it to yourself
- Don't be hamstrung by a purist view of what it is – experiment and refine for your own context
- Don't throw it away before you give it a chance to work – trusting in the process is essential to successful facilitation
- Do join a network to discuss practice
- Evaluate your use of action learning
- Read what others have said about it and join the International Foundation for Action Learning (IFAL).

7. How to introduce action learning sets – a simulation

This section suggests how you might introduce action learning through a simple workshop which simulates the process.

Introducing action learning to those unfamiliar with it should be carefully handled. To describe the set process is rarely sufficient to convince a group (of tutors or students) that the process would be useful. To really learn how to do it, you have to experience it but here is a simple activity which helps to show new participants the power of the process and in doing so illustrates the distinctive group process used in the action learning set. This is how I do it

with groups that are going to be split subsequently into action learning sets.

I begin by introducing the group to the idea of action learning and the main theoretical background of support for learning from experience. I talk to them about my experience of action learning and why I think it could be a useful process for them. I then say that we are going to run a simulation of a set process which will be carefully controlled by me and therefore much less fluid and more formal than a normal set but that it will illustrate the difference between working in a set and just having a group discussion.

I ask them to break into groups of four and for one person to agree to present an issue to the group. I find it important at this stage

to let them know that this issue will only be discussed in the small group and not in plenary, and that the group should agree to keep the content of the issue confidential. The presenter should choose an aspect of their experience that that they would like to learn from but not something too complex for the purpose of this exercise. Setting this up normally takes about five minutes. After they are in groups, having chosen a presenter, I say that we are going to divide the time into three equal parts. The rules are as follows:

Part 1 – Only the presenter speaks in order to present their issue while the others actively listen, showing interest but not speaking.

Part 2 – Here the other members of the set support the presenter in going deeper into the issues and uncovering their room for manoeuvre, their feelings etc to identify the main points and possibilities.

Part 3 – Here the presenter seeks to identify specific action points that would help move them on and support their learning. The supporters help with this but do not offer their own solutions.

As facilitator of the session I time it carefully and try to police the rules. At the end of the three parts I ask the groups to stop talking about the issue and to turn their attention to what they feel was different about the process from normal group discussion. I then debrief this in plenary, answering questions and pointing out things that help and hinder good set process. I find that with a group which is highly skilled in interpersonal behaviour, this introduction, lasting about an hour and a half, is sufficient to start off the sets. With other groups, less experienced in effective group work, there may be a need for more practice and firmer facilitation.

The workshop described in this concluding section has been used in various ways to introduce action learning to tutors considering its use and to students before they start using it. It can be custom-built into various time slots and effectively demonstrates the difference between action learning sets and other group processes.

8. Conclusion

This introduction to action learning has attempted both to describe and illustrate its use based on my experience over twenty years of varying practice. I hope that it has raised awareness of the method and helped to stimulate interest in its use. As a brief overview it cannot do justice to the subtleties of the method, its full uses or its limitations. In particular, the real essence of action learning can only be appreciated when it is used over a period of time for real. From the experience of a deliberate, supported and recurrent iteration of reflection, planning, action and learning, an appreciation will come. To understand action learning one has to do it.

I wish you all success.

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For discussion of action learning used for staff development: Beaty, L. (1999) Supporting Learning from Experience - chapter in Fry, H., Ketteridge, S. and Marshal, S. (eds.) *A Handbook for Teaching and Learning in Higher Education.* London: Kogan Page, 134 – 147.

A general introduction to experiential learning in higher education: Centre for Higher Education Development, available on-line at http://www.coventry.ac.uk/ched

To follow up the use of action learning for management of change in one university and for more information on the author of this guide: IFAL The International Foundation for Action Learning which is the organisation for those using and interested in action learning. The Foundation runs workshops and conferences, has a regular newsletter and keeps an archive of materials on action learning.

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