

Action Learning- a process which supports organisational change initiatives.

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Account of Practice

Action Learning- a process which supports organisational change initiatives.

Abstract

This paper reflects on how action learning sets were used to support organisational change initiatives. It sets the scene with contextualising the inclusion of change projects in a masters programme. Action learning is understood to be a dynamic process where a team meets regularly to help individual members address issues through a highly structured, facilitated team process of reflection and action. The key findings from evaluation of the students and facilitators' experiences are reflected on, together with plans for improving the experience for all stakeholders for the next academic year. In sharing this experience the purpose of the paper is to highlight the most significant learning from the evaluation. Good preparation for action learning is vital to ensure a positive experience for all involved. From the student perspective, an appropriate learning set mix is needed to ensure a balance of support and challenge for the action learning set. In addition to a preparatory workshop for action learning facilitators regular meetings with the action learning facilitators in the form of action learning sets could be scheduled as a support especially for those new to the process. Finally it is hoped that this account will encourage readers to use action learning for supporting and engaging students in organisational change initiatives.

Keywords: Action learning, change, evaluation, preparation.

Introduction and background

The aim of this paper is to share the findings of evaluating of an action learning process. Good preparation of the students and the facilitators was a key recommendation, and details of this preparation are outlined below. It is hoped that this account will encourage readers to consider the recommendations and to use action learning for supporting and engaging students in organisational change initiatives. Change projects were introduced as an alternative to the traditional research projects on masters programmes in an institute of leadership over three years ago. The impetus for this introduction was from conversations with potential students and graduates, all from healthcare settings, whose primary responsibilities were implementing health reform initiatives. Students communicated their concerns about lack of support and guidance in sustaining these initiatives. Following conversations with external examiners and members of accreditation teams it was decided to support students carrying out change project for their final dissertation. Introducing a change in students' organisations also met the institute's aspiration of providing a return on investment from education back to industry.

The institute offers two masters programmes which culminate in a final change project. The students on the programmes are interprofessional groups from different levels of management in their healthcare setting. These students undertake six modules prior to their project. During the modules they receive teaching on change theory and change models. In addition they are encouraged from the start of the programme to start planning for their final dissertation, by discussing initiatives which could be implemented in their healthcare setting during the course of their programme. Prior to organising action learning sets the students are required to submit a project proposal, which outlines the rationale for the proposed change, the challenges which they

might encounter and a Gantt chart outlining the timescale of the project. In addition, they are required to secure a signature from a sponsor in their organisation who agrees to support them carrying out the change. This stage takes place in advance of their action learning set (ALS) meetings. The final project submission has three parts: a dissertation, a poster displaying the change process using a model of change, and an e-portfolio entry reflecting on learning events which made a major impact during the project.

Assumptions of Action Learning

The author and other full-time and part-time staff in the institute are familiar with the benefits of using an action learning process for management and leadership programmes. This process has worked well for bespoke organisation-funded programmes, which delivered outputs such as improvements in practice. Staff, in the institute, value a participative style of teaching and learning. All students are at postgraduate level and come to the programmes with a readiness to learn. While it is assumed that students will be able to apply their learning to practice it is assumed that they will do this not because it is a logical output of learning and a rational thing to do, they do this with an understanding of self (developing personally and professionally) in approaching this action. Students are supported in the journey with knowledge and understanding and are challenged at times, in making sense of this knowledge. The questioning approach of the action learning process helps the participant think before diving into action. Thus, action and learning have a dependency on each other. The facilitators use their skills to draw out students' questions which are open, non-judgemental and challenging. They engage students in reflecting on their experiences in practice and their learning on the programme. In an action learning set a trust builds between set members and the facilitator. This trust may take a

number of sessions but once established it can be difficult to interrupt. These assumptions were very much to the fore once the groups were organised. Any addition to the already formed groups was viewed as interrupting a relationship of trust between members and facilitators.

Organisation of the sets

One hundred and two students were initially divided into seventeen action learning sets. These were allocated alphabetically by surname into groups of six, so that there was a mix of health professions and managers from different organisations. They met once every four weeks for three hours, in the institute, with a coffee break half way through. There was a total of six sessions. Students communicated with their facilitators and members by email or chat rooms at least once between meetings. They were focused in progressing their change projects and came prepared with outputs they hoped to achieve from the process. Questions were posed around who they communicated with about their projects, what level in the organisation were these people, what were their relationships with the staff, how did they think they could progress the project before the next meeting and what stage of the change they were at. One group decided on note-taking of questions as each student presented their issues. The questions were then shared with that student. This proved very useful for their reflections which they were required to document after each meeting. At the end of each learning set students communicated what action they hoped to achieve before the next meeting. They also communicated if there was any particular question posed in the ALS which encouraged them to think differently about their current approach to the project. Students have stated that a particular question in the meeting really helped them and allowed them to progress their project once they reflected on the question further.

Action learning facilitators were allocated to the sets randomly. Some of the facilitators were full-time staff in the institute while others were from healthcare backgrounds and had mixed familiarity with action learning, either as participants or facilitators. In the past the institute had experimented with self-facilitated action learning sets. Evaluation of this practice was negative from the students' perspective. They felt that they were not familiar enough with the action learning process to manage this type of learning and staff believed that the sessions lacked focus and purpose. Prior to commencing action learning facilitation a workshop was provided to staff to clarify the process and to address any queries. The students received a session on action learning in module six. They were clear, at the outset that within the action learning process there was no place for 'just doing nothing'. On the contrary it was about 'action'. Students soon understood that they needed to come back to each meeting with an action point achieved. Some had previous experience of using this process but most had never participated in action learning sets up to now. The author took the role of overall coordinator for the action learning sets and the projects. She also facilitated one action learning set of six students who had returned to the programmes after taking a year or more out of study.

Challenges encountered

Working with postgraduate students always brings unforeseen challenges. Adult learners, some returning to study, after many years, take time to adjust to catching up with new technologies and academic writing. More importantly, this group of students have families and life issues competing with these commitments. In coordinating such a group the rewards are immense and academic staff come prepared to deal with life issues from day one. The challenges encountered

in using action learning for this group are presented under: numbers in sets and dependence on facilitators.

Numbers in sets

Students on the masters programme have the option to exit after the six taught modules with a postgraduate diploma. However, this information is not always conveyed to the programme administrators by the students until after the action learning sets are formed. Meetings were scheduled for Mondays and Tuesdays. The initial challenge around numbers in the sets only emerged on the first scheduled action learning set. In one case there were three students in one of the Tuesday groups although six were allocated. Later this group dissolved to one student as the other two students deferred their studies due to extenuating circumstances. This challenge impacted on the lone student and facilitator, who himself was a recent graduate. He had experienced action learning the previous year as a student but was new to facilitation. Rather than disrupt groups, and interrupt the relationship of trust which may have already formed between members and facilitator, a student, who requested to attend a Monday set instead of a Tuesday one, joined the lone student. The author also took part in the meetings which then brought the number back to four. Although, not ideal, the student who had a meeting on a one-to-one basis with the facilitator (in more of a coaching capacity than action learning), stated that she benefitted greatly from the additional attendees.

Dependence on Facilitators

Dealing with student numbers of this size meant that dependence on facilitators attending for the sets and getting the action learning process working well were two high risks. In addition, a period of adverse weather brought an unplanned absence of one facilitator, due to an accident.

This resulted in a need to match up two groups (which were assigned to him) with a replacement facilitator for the remainder of the sessions. Such unforeseen disruption resulted in challenges for the students in getting to know their replacement facilitator, at a time, when trust had built up between them. They voiced the challenge of going back to the start of the process again to update the 'new' facilitator. Some of these issues were further highlighted during the evaluation of the action learning process, when students felt their motivation for the projects was interrupted due to this challenge.

Evaluation of the action learning sets

An Action Learning Set Evaluation (ASLE) tool was used to survey students who participated in the process as part of their master's programme. In addition to quantitative data in the survey each statement had a section for open comments. The evaluation also included focus group meetings with the facilitators. The survey suggests that action learning is a powerful tool in engaging students to take ownership of their change projects. This ownership is assisted by the use of questioning from team members so that peer accountability ensues. The power and benefits of action learning are discussed with examples of quotes from students and facilitators.

Student Feedback

The questions in the ASLE tool (Lamont et al, 2010) focused on the importance of : the action learning set meeting; the opportunity to present your problem; the use of challenge/support within the sets; engaging in reflective enquiry; and helping your ability to problem-solve. A visual analogue scale was used to plot the importance of each statement from 1 to 10 with 1 representing 'not at all important' to 'very important' (10). The majority of the students rated all statements at eight on the scale. The open comments revealed how the action learning set

meetings helped the students to ‘keep me focused’, ‘stay on track’, gave me direction’, ‘interact with others’ ‘safe place to discuss issues’ and ‘gave different perspectives’. In addition to capturing the positive feedback the students got an opportunity to make explicit their feedback on what they least liked about the action learning sets. Comments included ‘lack of clarity around taking the right direction’; ‘time management’; ‘reality of how much I had to do before the next meeting’; and ‘having a new member join a group midway’. On probing these issues further students suggested that the project details be introduced much earlier in the programme. They suggested that details of the dissertation and more input on action learning be communicated in year one. For the most part comments were very positive and encouraging. Reference back to the importance of the skills of the facilitator were evident throughout. These were mostly positive but some students did note the different experiences of facilitation skills from colleagues who benefitted from facilitators who were experienced in the process. Where there was poor attendance or a small number in the set due to students deferring off the programme the students commented that they missed out on the full benefits of the action learning interaction.

Facilitator Feedback

Two focus groups were held with the facilitators. Questions included: Do you believe that the action learning set meetings engaged the students? What evidence do you have that they were a means of support for the students? How important was it for you to understand your role as facilitator for the ALS? What did you like best about the ALS? What did you like least about the ALS? Do you have any other comments you would like to make about the ALS? It was interesting to note that engagement of the students was judged around their attendance, or not, at the meetings. Some discussion took place around engagement and attendance as to whether this

was an accurate judgment of engagement. One facilitator was impressed how prepared the students were in coming to the meetings. This was noted by the group as a commitment by the student which in turn supported their engagement as it meant the student was accountable to others in the group. Examples of support for the student were centered on the group's interaction between meetings and some facilitators emailing the groups regularly to keep them motivated and challenged. The facilitator's role was discussed at length during the focus groups. Interestingly, they felt that the focus group itself clarified their role as they shared their experiences with each other. Those with more experience of facilitating the sets were confident in sharing what worked well for them. The facilitators suggested that interim meetings with each other, in the form of a focus group, would benefit them in the future.

One key finding from the focus group meetings was the composition of the sets. The diversity of the groups was judged as very important for all facilitators. The mix of health professions in a group to challenge and support seemed to work best. It was suggested that students, whose first language was not English, would benefit from being with students who have English as their native language. One group was made up of three students who were not native English speakers. At times the facilitator noted there were difficulties in communicating during these meetings. Another surprising finding for the author was that many members of the groups did not know each other despite being on the same programme for over a year. This highlighted a custom of using the same small groups (at round tables) for taught modules. This meant that students did not mix with different groups until the action learning process commenced.

Improving the action learning experience

Based on the evaluations from students and facilitators and the challenges encountered there are a number of recommendations being put in place for the next academic year to ensure the best action learning experience for all involved.

1. Action learning sets have been organised by a system of randomised selection. In addition to this process the composition of the sets are checked for diversity of groups in relation to profession and nationality. Such diversity will help challenging questions from other professions.
2. The action learning process and change projects are introduced earlier in the programme, i.e. on the first module. This will help students come to the meetings more prepared for an action learning process so that using a questioning approach will be easier. Knowledge of the process will highlight the importance of communicating their intention to continue on the programme well in advance of the start state, unless unforeseen circumstances arise.
3. The group compositions, at round tables, are mixed at the start of each module, so those students get to know all their classmates better. This will help build up trusting relationships with set members earlier.
4. Action learning facilitators are scheduled to attend a training session on the process prior to the start of the meetings and a follow-up meeting will be scheduled with all facilitators midway through the process. This will support new facilitators and allow them exchange

tips for good practice and support them in decision-making and follow-up between meetings.

5. The coordinator of the learning sets will not be assigned to a group. This allows him to be freed up to oversee the process in action and to be available should an unforeseen circumstance occur to prevent a facilitator attending a session.
6. Action learning facilitators will encourage group members to connect up via chat rooms etc. between face-to-face scheduled meetings. This will promote commitment and engagement at an early stage.

Conclusion

The paper presented an account of practice which recounts how action learning sets were used to support organisational change initiatives. It focused on the learning gained from evaluation of the logistics of setting up action learning, preparing the students and facilitators, and the process itself. Planning and good preparation of students and facilitators are paramount to ensure that action learning supports students as they embark on their change initiatives. All students on the programme progressed well with their projects and implemented an initiative in their work place which was successful. Some of this success was down to the support of the action learning process in keeping students focused, on track and giving them direction. Action learning sets facilitated students disseminate their project ideas across healthcare settings within their groups and some are now actively networking with each other to replicate these changes in other institutions. The initiatives have confirmed a real return on investment for the employer,

particularity if they helped support the student financially in undertaking their studies.

Organisation sponsors are rewarded with a successful change implemented which has authentic meaning for staff who participated in the project. Such feedback has been communicated back to the institute by healthcare managers directly and indirectly in their support for more staff to enrol in our masters' programme primarily because of the dissertation component being a change initiative rather than a traditional research project. While this evaluation was worthwhile in identifying key areas which needed to be addressed so as to improve the action learning process, the richest information from the students came via the open comments at the end of each question on the ALSE tool. It is acknowledged that this was a new tool developed from the action learning literature and it needs further testing for validation (Lamont et al, 2010). The focus groups with the facilitators were very informative and also acted as a support for the facilitators in sharing experiences of the process. As this was a new experience for the healthcare professionals a qualitative evaluation tool, such as a focus group, would have worked as well, if not better on this occasion, and is planned for next year. While the majority of the students selected eight on a ten-point scale of importance this information did not allow a sufficient insight to these students life experience. The next step in this process for the institute is the consideration of using a framework of action learning research (Coughlan & Coughlan 2010). These students are engaging in reflecting on their experiences of implementing an organisational change via their electronic portfolios. They collaborate with their ALS members and with their colleagues in the workplace to ensure a successful change. There is engagement with real-life issues and there are workable outcomes and actionable knowledge.

References

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