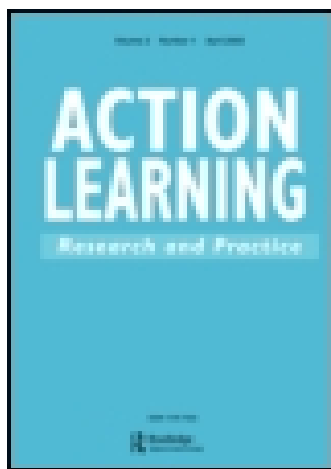


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Nurturing the H in HR: using action learning to build organisation development capability in the UK Civil Service

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Nurturing the H in HR: using action learning to build organisation development capability in the UK Civil Service

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In the UK, the Civil Service Reform Plan is being implemented with urgency. This requires Civil Service departments and agencies to reform their structures and ways of working in order to deliver effective services in a climate of economic austerity and rapid social and technological change. Historically, Human Resource (HR) professionals have provided services based on the HR Business Partner model which has meant a focus on strategic and operational HR services. As part of these changes, HR managers and other professionals are now required to develop their capabilities in providing Organisation Development (OD) advice to their internal clients. In order to make this happen, the Civil Service's expert OD and Design Service launched an OD Capability Building programme and engaged OD specialists Mayvin to deliver it. The programme incorporates the postgraduate level-accredited Action Learning Question method developed by Dr Richard Hale called, in this context, OD Questions (ODQs). Participants on the OD Capability Building programme are required to complete an ODQ over a five- to six-month period. This entails scoping an OD challenge with key stakeholders, conducting some research and making recommendations for change or implementing such change. The participants work in 'action learning sets' and support each other with their problem solving and learning. A final report is written up by each participant leading to the award of postgraduate-level credits. Examples of ODQ areas include: How can I support a newly appointed Director General to align his team to address their challenges at a time of rapid change? How can I help my client department to improve employee engagement? How can I develop my own capability in working as a business partner and adding value alongside my client?

Keywords: action learning; organisation development; learning organisation; HR; human resource development; civil service; capability building; action research; action learning questions

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Introduction

In the UK, the Civil Service Reform Plan is being implemented with urgency. This requires Civil Service departments and agencies to reform their structures and ways of working in order to deliver effective services in a climate of economic austerity and rapid social and technological change. Historically, Human Resource (HR) professionals have provided services based on the HR Business Partner model which has meant a focus on strategic and operational HR services.

As part of these changes, HR managers and other professionals are now required to develop their capabilities in providing Organisation Development (OD) advice to their internal clients. In order to make this happen, the Civil Service's expert OD and Design Service launched an OD Capability Building programme and engaged OD specialists Mayvin to deliver it. The programme incorporates the postgraduate level-accredited Action Learning Question (ALQ) method developed by Dr Richard Hale called, in this context, OD Questions (ODQs). Participants on the OD Capability Building programme are required to complete an ODQ over a five- to six-month period. This entails scoping an OD challenge with key stakeholders, conducting some research and making recommendations for change or implementing such change. The participants work in 'Action Learning sets' and support each other with their problem solving and learning. A final report is written up by each participant, leading to the award of postgraduate-level credits.

In this article, the programme is viewed through the lenses of delivery consultant and OD specialist Martin Saville, action learning specialist and accreditation adviser Dr Richard Hale with contributions from participants and other programme faculty. We consciously alternate between the theorist and the practitioner perspective to show the balance we have held in this work between conceptual depth and organisational impact.

Perspective of an OD specialist consultant

Martin Saville provides his perspective as a specialist in Organisational Development:

Mayvin was brought in by the Civil Service's expert OD and Design (OD&D) team, a shared service based in the Home Office that provides internal OD&D consultancy to government agencies and departments. They were looking for a partner to support them in building OD capacity within the HR Community. This was part of a joint initiative with the Civil Service's (much larger) HR shared service to equip HR to play the fullest possible role in the significant and far-reaching changes that the Civil Service was experiencing.

The emphasis of the 'OD Capability programme' that Mayvin created was on working with political dynamics, with complexity, with the informal, 'human' aspects of organisational change. Participants were encouraged to

adopt a systemic approach to their work, and to find ways to relate to their internal clients as collaborative partners or ‘process consultants’.

The intention behind the programme was not so much to change what HR people actually do, but rather to support and challenge them to change their mindset and overall approach to their ‘day jobs’. Success would mean that HR operated in more of an ‘OD way’, becoming more like ‘critical friends’ to the business than ‘experts’ or ‘doers’.

Because the programme sought to help HR practitioners to change their approach to their existing work, there was a very strong emphasis on application in the programme. It was not just a case of taking a tool and trying it out. Participants had to work out who their internal client was; they had to start to have different (‘contracting’) conversations with their clients in which they started to position their working relationships with them differently, maybe pushing back on some things; they had to perform a wider-ranging ‘diagnosis’, asking more challenging questions about ‘transformational factors’ such as strategy, leadership and culture – things that were perhaps beyond their traditional remit.

All this had to be done within participants’ real contexts, rather than within a controlled training environment, so participants were dealing with real people, real politics and real deadlines, changing jobs and all the other things that make the real world of organisational life so messy and challenging. In this context, the action learning approach, with its emphasis on application and on ‘helping people find answers to questions they’ve not yet asked’ seemed to fit perfectly.

The client was also very keen to have the programme accredited. This was partly with an eye to quality assurance, but also because they believed that it was the best way to ensure that participants prioritised engagement with the programme’s crucial application elements. The overall programme design therefore developed into 2 taught modules, comprising 5 days in total, plus 3 day-long action learning sets, a work-based project framed as an ‘OD Question’ (ODQ) with a write-up of the actions taken and related learning submitted for assessment. This is accredited at postgraduate (Level 7) by Middlesex University which recognises the generic ALQ methodology developed by Richard Hale.

The ODQ had to be grounded in participants’ work context and served as the focus for their application of the learning. Participants needed to identify the client and stakeholders for this ODQ, negotiate terms of reference with them, and then, using a structured ODQ process, create ‘knowledge maps’ for the ODQ consisting of ‘ground research’, which related to experiments ‘on the ground’, and ‘sky research’, which had more of a focus on existing models and theories.

In their action learning set meetings, which were facilitated by the Mayvin programme tutors, participants brought along their progress to date, reflected together and exchanged feedback, support and challenge. Thus, the principles of ‘cycles of action and reflection’ and of social learning were embedded into the programme. The programme length from Module 1 to submission of participants’ papers was around six months.

The results to date have been very interesting, and largely positive. A number of the participants came into the programme with previous experience of action learning sets. While some people had had good experiences, others had found them a bit pointless – nothing more than a ‘cosy chat’, or an opportunity for a ‘collective moan’. People found the purposeful focus and structure of these learning sets refreshing and very productive by comparison.

Some people resisted the level of detail in structure, saying that they found it oppressive or unhelpful. In such cases, we were happy to invite people to let the structure go – as long as they met the criteria for the accreditation, which were clearly articulated, we were happy!

Working with people to support them to articulate and then answer their ODQs was very enlightening. There were a number of wonderful ‘penny-dropping’ moments, where participants would suddenly make a comment along the lines of ‘oh, now I get what you guys were on about when you said x and y!’. It was also powerful watching senior Civil Servants charged with major responsibilities desperately wrestling with how best to balance the very real need to move at speed and pace, or to deliver what was being asked of them, with the requirement to slow down, challenge back and think more widely about the issue at hand.

The ODQ process also really caused participants to come face to face with themselves. In some cases, this happened as people started to make the move to ‘critical friend’. In a hierarchical organisation, this is particularly challenging and it caused people to look deeply at how they work with and respond to their own power and that of others. For others, it was being required to slow down and reflect that really helped change their perspective.

For others still, the moment of truth came when they were required to write up their work. As the deadline loomed, we found participants looking to give up because they did not feel ready, others wanting to seek an extension, some rebelling against the programme design, others getting trapped and paralysed by their own perfectionism.

The programme is designed to help people look at and understand their own responses to what is happening around them – the capacity to do this skilfully is a key OD capability, sometimes referred to as ‘use of the self as instrument’. The action learning process supports this, providing a safe space in which people can start to notice their perspective on things and ‘hold it at arms’ length’. When people found themselves coming up against their particular patterns, they were encouraged to notice them, see how they repeat over time and in different contexts and catch themselves in the middle of them – both in the learning set context and out in the ‘real world’. While offering powerful learning, all this is, of course, is very challenging for participants, and so the creation of a supportive environment in which this learning can take place becomes crucial. As one participant so eloquently put it, ‘I simultaneously look forward to and dread my action learning set meetings’.

Action Learning Questions meet OD

Richard Hale explains how a business focused action learning approach was adopted to help build OD capability in order to tackle real work-based challenges.

In the Civil Service OD programme, while the target population comprises mostly HR professionals, the drive for the programme has come from the need to address ‘business’ (a word the Civil Service does use) challenges. It is seen as fundamentally related to the strategy for the Civil Service and its priorities as described in the Civil Service Reform Plan. There are many current and real challenges each department faces, which are determined by a combination of external political, social and economic factors as well as being affected by internal organisational dynamics. Indeed, it might be considered that political, social and economic factors also work internally within and between teams and leaders.

A very helpful taxonomy of the variations of action learning which have evolved since Revans’s original formulation of $L = P + Q$ is provided by Kozubka and MacKenzie (2012). It is proposed that among the different types of action learning which now exist, there is a distinction between those initiatives or programmes which are driven initially by a personal development agenda and those that are ‘business driven’. This is not to say ‘personal development’ and ‘business driven’ objectives are mutually exclusive – of course they are integrally intertwined. However, this is about the *driver* for action learning in specific programmes; is it coming *initially* from the *business* or is it driven mainly from the desire to develop people?

At the launch of the Civil Service OD Core Practice programme, I ask participants about their prior experience of action learning in order to surface what type of action learning they have experienced either as participants or facilitators. Interestingly, but perhaps I should not be surprised, given this is mainly a population of HR professionals, their prior experience has been of ‘personal development’ driven action learning. This has included for instance:

- Programmes where a particular population in a talent pool is asked to tackle a work-based project in order to be able to demonstrate certain competencies.
- Leadership development programmes where the follow-up to the off-job workshops is a period where some action is encouraged, with a view to the group meeting again as a learning set to find out what has happened.
- Action learning sessions built into an off-job course and mixed in with other methods more concerned with training than learning.
- Non-directive group problem solving.

The drive for such action learning initiatives typically starts in the HR or Learning and Development function, not from the top of the business. Some

report positive experiences of such experiences of action learning and some said that the initiatives petered out due to lack of ‘bite’ within the business. In my view, designers of such programmes tend to view action learning as simply one of a number of training tools in their kitbag. I prefer to see action learning as a philosophy or ‘*way of being*’ which has certain principles and it may be enhanced by the application of certain tools or techniques. Furthermore, these applications of action learning are quite a long way from what Revans actually did in the programmes he worked on. He always started with a business or organisational challenge, witness, for example, his work with the UK coal mines, the London hospitals, the Australian government, Nigerian palm oil production and the national economy in Belgium.

My point in opening up the discussion with participants at the start of the programme about the different interpretations of action learning they have experienced is to be explicit about the business-driven nature of this programme. For some, this demands unlearning about the nature of both learning and action learning. Ensuring that a business and organisational focus is maintained throughout the programmes is helped by the fact that the glue holding the programme together over time is the ALQ methodology.

In July 2013, I reported in this journal on the development of the Action Learning Question (ALQ) methodology and its application to support leadership development in business sectors ranging from financial services to childcare (Hale 2013). In summary, the ALQ approach provides a system to enable action learning to improve business performance in the modern organisation. It embraces the original formulation of Revans that effective learning when an organisation faces unprecedented change will come from a combination of insightful questioning (Q) about the unknown combined with accessing of existing or programmed knowledge (P) – so L (learning) = P + Q (Revans 1982). With the ALQ approach, we also consider reflection to also be an essential part of the process; see Kozubska and Mackenzie (2012) who note the formulation by International Management Centres Association $L = P + Q + (R)$, where R = reflection.

So, the ALQ approach has been adopted as a core component of the Civil Service OD Core Practice programme being rolled out to around 200 civil servants over approximately 2 years to develop the capacity of HR professionals to influence positive reform of public services by adopting an OD mindset. The Civil Service Reform Plan¹ states the need for Civil Service departments and agencies to become more agile, unified and skilled. There is a recognition of the requirement for civil servants to work more effectively with external organisations and to be more resourceful and flexible internally. It is clear that the contribution of HR professionals should extend beyond the realm of conventional HR. Programme Participants are now expected to engage with senior leaders in order to understand their challenges. They have to provide professional support to effect sustainable change in a climate of considerable cost, time and resourcing pressure.

Involvement with this programme has been most exciting because not a day goes past without major news items coming into the public domain of relevance to the role of the Civil Service. In the time I have been involved in the programme, this has included, for instance, border controls, a health sector crisis, educational reform, environmental issues exacerbated by extreme floods and security of information. All are high-level challenges ripe for treatment as ALQs. The Civil Service engaged OD specialists Mayvin to provide expertise in designing and delivering a programme to support OD Capability Building. The intention was to increase knowledge about OD, foster more of an ‘OD mindset’ and offer a range of practical tools for participants to use in tackling their real-world ‘here and now’ challenges when working with internal clients.

Participants on the programme are typically in HR Business Partner roles or other operational HR roles. Most tend to be comfortable in the role of HR process expert, adviser or implementer, several working to provide services at the Director General level. Many, however, are less comfortable in the role of OD consultant with its ambiguities and the need to manage politics and power relationships.

So, the programme is concerned with the development of OD capability in a culture which had previously associated the D in OD with ‘Design’. It is now clearly recognised at the highest levels that confining OD to structural and design activities is limiting. This is not a new phenomenon:

We trained hard, but it seemed that every time we were beginning to form up into teams we would be reorganised. I was to learn later in life that we tend to meet any new situation by reorganising, and a wonderful method it can be for creating the illusion of progress, while producing confusion, inefficiency and demoralisation. (Caius Petronius: AD 66)

For this programme, ALQs became OD Questions (ODQs) and an action learning approach was adopted. Indeed, an action learning approach – working in learning sets, tackling real problems and focusing on questions – has underpinned the OD ethos of the programme. Over a period of five to six months, participants define, with stakeholder input, an ODQ which addresses a ‘wicked problem’ (Pedler 2012) and they address this question passing through at least two cycles of action learning comprising:

- discussion of the business problem in an action learning set;
- planning for action;
- action and research;
- review of action and research in the set.

This follows the style of ALQ I call a ‘*How can I...?*’ type Question. Action learning sets of up to eight members meet to support each other tackling different ODQs. The context in which these Questions exist is, on the one

hand, common (within the Civil Service and aligned with the Civil Service Reform Plan), yet, on the other hand, may be unfamiliar (members are from different departments and agencies). This Revans framework of *familiar/unfamiliar problems/context* (Gasparski and Botham 1998) provides a means for helping participants to consider the degree of unfamiliarity and therefore challenge they are willing to face when shaping their ODQ in discussion with stakeholders.

OD Core Practice Programme Design

The 'core practice' programme is targeted at HR practitioners (mainly at grades G6/7 and some PB1s) across all departments who are new, or relatively new to OD and particularly those working in roles and/or teams which are key to delivering or supporting organisational change with client Directors General and Directors.

- This programme runs over a period of five to six months which includes an eight-day schedule of workshops including three one-day learning set meetings, culminating with the submission of an 'ODQ' report covering the research conducted, actions taken and personal learning.
- Successful completion of this earns 20 postgraduate (Level 7) credits level (from Middlesex University) for successful completion of the ODQ which is written up as an account of action, impact and learning.
- Five cohorts of 13 or 14 participants have been started since March 2013. A further six cohorts are planned for 2014 and 2015.

Examples of ALQs/OD Questions

- How do I bring about change in my organisation so that people embody the behaviours they say they value?
- How can I move our Organisation Design Service offering closer to being the 'irresistible supplier of choice'?
- How do I ensure that my department's Strategic Communications Resourcing Strategy addresses more than just vacancy filling, and supports and embeds strategic, collaborative and flexible ways of working?
- How can I assist the Senior Leadership Team of a newly formed Department to ensure that staff are fully engaged in the changes that will come into effect from April, while recognising the need to maintain business as usual in the interim?
- How can I get buy-in, action, commitment and ownership from a group of senior Civil Service advocates as part of an overall (Leading Change) development programme in a way that is at the forefront of a change and moving us towards becoming a learning organisation?

The ODQ method of structuring action learning requires the problem holder to face complexity, with support from other action learning members. Additionally, the problem holder, in tackling the ODQ, is not conducting internal and external research as simply an exercise in order to complete the programme, gain their certificate or to comply with the system. They are part of the organisational structure politically and their ability to contribute for improving organisational effectiveness is influenced considerably by their *own* level of confidence *and* the social–psychological dynamics of their relationships with others. As such, early on the programme, the OD experts from Mayvin explain the concept of ‘*self as instrument*’ (Cheung-Judge and Holbeche 2011) which fits well with the concept of ‘*reflective practitioner*’ (Schön 1983) which I see as core to the ALQ approach.

For some participants on the programme, being encouraged to work as reflective practitioners and considering ‘self-as-instrument’ has challenged their existing frame of reference. This has been particularly so in a culture which values professional knowledge and expertise very highly. Qualified professionals on the programme used to studying ‘it’ or ‘them’ and providing objective analysis in the scientific tradition have on occasions become quite stressed as they realised they needed to study themselves and their impact on others. Many have been conditioned to produce the solution to problems by the application of professional knowledge. In their professional role, civil servants are used to giving best advice to other professionals or leaders and it is the ‘Programmed Knowledge’ (P) which is traditionally highly valued. Professional advice is given based on the premise of trying to present valid research and keeping oneself removed from the subject matter – not ‘contaminating the evidence’.

However, there were clear rewards for those who embraced the OD approach by taking a ground-up approach, identifying problems with the client and considering how to manage their relationships with clients. Taking a more relativist perspective and recognising that there might be multiple truths at play within and between their departments has indeed been an eye-opener for many. We say that you should make yourself part of your research and study how you feel and behave as a key player at the centre of your OD Question.

So, the ODQ methodology has put the Q at the front of the action learning process on the basis that the sort of challenges being addressed are messy, ‘*wicked*’ problems where further clarification and perspective on the question are required before rushing to conclusions or into action. This provides a healthy challenge to participants who may feel uncomfortable going to senior leaders posing questions or even seeking clarification on their own semi-formed question. The best results in terms of addressing significant organisational challenges, though, often come from those Questions that actually change shape as more stakeholders, inside the learning set and in the business, are involved in providing their perspectives on just what is the key question.

The action learning facilitator perspective

The perspective of an action learning facilitator on the programme provides some helpful insights:

Relational and systemic change

People on the programmes have been developing a more politically astute, systemic and relationship-focused approach to their work. They are generally working from the small scale up, maximising their impact and building out to a wider network. They are developing more wisdom about the complexities that have to be managed in effecting change in a Civil Service context, particularly at a senior level. Examples of this would be where people have used their OD Question as a lever to widen their network of influence beyond their formal channels, while being sensitive to the politics of doing so.

Going beyond 'using the right language'

As the programmes have progressed, we have noticed people shifting from using 'Corporate or HR speak' (words like 'engagement', 'ownership', ... etc.) to actually considering the meaning of these words in practice. This has caused them to think about their on-the-ground role in making these things happen. An example would be when people consider the corporate values in the light of their own values, and consider how they are living them (or not).

Making it personal

We have noticed people taking a stand, 'being the change' and considering and acting upon how they can become more responsible, rather than going through the motions, following a process or just 'wearing the clothes' of change. A small example would be when someone decides to walk around a department with a laptop, persuading individuals to fill in an important survey, as one strategy for embodying a wider policy of 'engagement'.

Mapping and navigating knowledge about the knowledge

Richard Hale describes how the Knowledge Mapping process has helped participants to contextualise their work-based action learning challenges

While business-driven action learning, and the ALQ method in particular, starts by asking what the fundamental Question (Q) is that needs to be addressed, this does not mean that the place of Programmed Knowledge (P) is subjugated in value beneath the Question. Revans made the point that Programmed Knowledge is mainly of use in the action learning process in helping us to understand what has been discovered in order to tackle problems

of the past. This is not to say prior knowledge is useless but he did propose that if we are concerned with problems that have not been addressed by others before, then we need to give more attention for asking insightful questions of each other, often questions about our ignorance, in order for thinking to break through the barrier of unknowns. This was a clear lesson Revans had drawn from his early experience as a Research Fellow in the 1920s at the Cavendish Laboratories working with 10 Nobel Prize winners. Every Wednesday, the scientists attended a seminar with Lord Rutherford who insisted each scientist started the seminar by confessing what had gone wrong with their research.

Out of my own experience in the past 14 years of developing the ALQ approach, I have evolved a practical process to support investigation of existing knowledge related to the ALQ – this is known as ‘Knowledge Mapping’. This has been put to good use by participants on the Civil Service programme as a means of helping direct research relevant to the ODQ being tackled. This works like mind-mapping, but it is essential that it is conducted collaboratively, usually within the action learning set, in order to access the knowledge of others about knowledge related to the Question. So, a visual mind-map is created by the problem holder who draws on ideas from set members about sources of knowledge on the ‘ground’ (e.g. organisational contacts or data) and in the ‘sky’ (e.g. external research, publications, experts or other organisations).

A criticism levelled when I presented this approach to a group of action learning advocates recently was that this was not really action learning. ‘*Why not?*’ I asked. ‘*Because when you give your own ideas about where the problem holder might find relevant knowledge you are being directive and telling them what to do which is not action learning*’. Not so in my view. Back to Revans who was always keen to stress the value of looking to others outside of one’s own organisational context for ideas and who, not surprisingly given his career as a physicist, valued data analysis highly and of course recognised above all the value of learning ‘*with and from others*’. (After all, he employed social scientists to number crunch on the Hospitals Internal Communication Project).

One can contribute to another person’s Knowledge Map to help them decide how they will navigate the map and to help them decide where to go and where not to go, while recognising the reality of their time and resource constraints. The problem holder retains ultimate responsibility for what he or she does or researches and in this sense remains self-directed. Self-directed does not have to mean self-restricted.

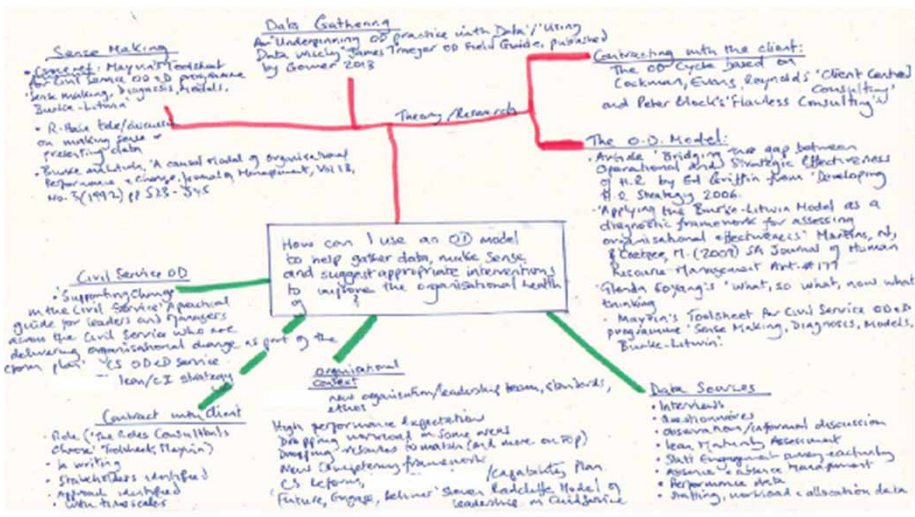
Interestingly, Revans was specifically critical of notions of psychotherapy or reliance on therapists in action learning and he critiqued the work of Carl Rogers and the idea of one party in the helping relationship being an ‘expert’ in being human and genuine. He felt that ordinary people could help each other. In fact, he made a strong case for the mutuality of learning relationships

and was even sceptical of professionalisation of the role of the action learning set adviser (Gasparski and Botham 1998).

In the Civil Service programme, Knowledge Mapping has been put to good effect leading to purposeful research and insights that have led to deliberate and conscious action, which may not have been the case had individuals tackled their Questions as lone-rangers working on instinct alone with their limited personal map of the knowledge relating to their question.

Examples of Knowledge Maps created by two participants as part of their ODQ are shown here.

Example ODQ Knowledge Maps



What have been the outcomes?

Richard Hale discusses outcomes so far from different perspectives

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Standards and quality in action learning

Revans never said that action learning should be accredited. But, then again, he never said that it should not be. Indeed, in 1983, when the Institute of Scientific Business, originally founded by action learners in 1964, launched a pattern of postgraduate awards solely by action learning (and became International Management Centres), Reg Revans lent his full support by becoming its President. Now with 50 years of experience of running accredited action learning programmes, IMCA has supported thousands of leaders and managers from organisations through accredited programmes of action learning. It was initially working with colleagues at IMCA that I formulated the ALQ approach, at a time when I had been asked by corporate clients to develop an accredited programme to support leadership and business improvement in a period of accelerating change. Initially, universities were sceptical about accrediting an approach which essentially is a process rather than a programme and has no predetermined syllabus. Traditional educational institutions and business schools tend to be more preoccupied with inputs in terms of programme content, than outputs and *return on investment* which *is* of particular interest to the sponsoring business.

The Civil Service was very specific at the design stage in wanting the OD Core Practice programme to be accredited at postgraduate level. This was about ensuring that a high standard of work is produced by participants and that faculty delivering the programme was working at a certain level.

So how does postgraduate-level accreditation work in such a programme?

The nature of the ODQs within the Civil Service programme can be seen to be unique for each action learner; indeed; I would insist each participant's Questions is personalised. A guide is provided with examples of ODQ areas; but this is only used to help participants think of their own ODQs. This is very different from choosing or being allocated an academic assignment.

Participants follow the guide which helps them to structure their work, research and learning through the key stages of Question formulation, Knowledge Mapping, research, action and reflection. They are encouraged to 'journal' their actions, learning and reflections over the five- to six-month period of the programme. A template is provided to help when they write up their ODQ and present it for assessment. Assessment is then conducted by accredited Action Learning Facilitators who work to standards derived from the UK Higher Education Framework. This focuses on seeking evidence of, for example:

- Problem formulation.
- Deciding potential sources of knowledge.
- Conducting work-based research.
- Analysing data.
- Making recommendations for change.
- Learning at various levels (knowledge, skills, insights, professional and personal).

In terms of outcomes at an organisational level, there is a reassurance that those who successfully completed the programme have done so to a nationally recognised educational standard. So, key capabilities are developed in order to succeed, such as the ability to take a self-directed approach to work challenges and learning, ability to research and analyse problems and to present cogent arguments to support change.

Additionally, individual ODQs focus on different business challenges, the outcomes of which are made explicit in their papers.

Participant perspectives

Participants have reported considerable benefits at a personal and professional level and, in many cases, the most valuable learning is that which could not have been anticipated at the start (in the form of formulaic ‘learning outcome statements’). It is learning at the level of insights about *oneself* and the *organisation* – beyond knowledge and skills, which can be applied in the future for the benefit of individuals and the business in different contexts. These insights have come from noticing what was going on both within the off-job components of the programme (in the learning set, workshops and tackling the ODQ assignment) and in the organisation when working with clients. The fact that participants were encouraged to view the learning set as a small organisation of which they were part provided a powerful means of gathering data for comparison with contributions and behaviours outside the set when working with the client.

Some comments from graduates of the programme were:

In appraisals and regular 1:1s my line manager has raised the need for me to be more ‘planful’, to use her words. Recognising in me a certain talent for ‘pulling rabbits out of hats’ (again quoting my manager), but being a poor planner, we have discussed the balance I need to strike between good planning and delivery under pressure. The term planful has emerged, as much in my view a behaviour, or state of mind, as a skill. I have to acknowledge that I should have been more planful in respect of being a few days late on delivery of my agreed ODQ deadline.

Like all of us, back in the workplace we’re doing OD all the time. But answering an ODQ, using action learning, undertaking research and analysing what we are doing, why and what our observations are in a more structured way for it to be assessed by was a bit different and rather daunting. In saying that, my learning journey was immense. I personally used skills I forgot I had. It forced me to collaborate with others in action learning and reflect (which I normally don’t have much space or time to do). That gave me a better sense of support and direction. I felt able to contribute to others’ knowledge maps through action learning sets and I was able to bring myself, valued and equal to others despite some being more senior than me. Overall, I feel I have increased confidence, credibility and know now what I am capable of.

During one action learning set session my silence throughout a whole 25 minutes intervention so surprised and confounded my fellow set members, it caused me to

examine its wider value. I realised that I was not only listening, but also reflecting and analysing what I heard. This significantly improved the quality of my interactions with others.

The value in taking forward difficult organisational challenges with people themselves affected by that challenge is immeasurably improved by having the confidence to involve them.

The programme has clearly helped OD professionals to realise that they are contributing more by offering professional services to support development of client organisations, than they would by focusing simply on organisation design. Most powerfully they have realised that the change they seek in others starts with themselves. Revans (1982) asserted with his concept of System Gamma that the social aspect of action learning provides a means for individuals to consider the changes occurring within themselves. It might be considered that this dynamic is at work at both an individual and professional level within the CSOD programme. However, there is no place for complacency; Revans also notes that the ability to arrive at personal insights (deep level learning) may be impeded by the desire for self-preservation of one's self-concept.

Many participants may have arrived at the start of the programme with the expectation that they would be taught a series of OD techniques or theories which could be applied in order to enhance their perceived expertise. Techniques and theories though can provide a convenient hiding place for those seeking refuge from personal exposure. I recall one participant relaying her frustration at not being able to apply her influencing skills in working with a new senior-level client. She said '*I am a qualified chartered organisational psychologist, I should be able to do this*' This highlighted the importance of recognising the significant difference between knowing and doing something as well as the challenge of working with the real social science of organisations, not simply studying it.

Those who have achieved the most are coming to realise 'We must not try to make a Reality which conforms to the Theory, but instead construct illuminating Theories arising out of Reality itself in order to better understand Reality.' (Albert Barker's 'Fundamental Aspects of Action Learning' in Gasparski and Botham 1998, 15).

Reflections of a facilitator on an action learning set meeting

Revans was critical of the role of self-proclaimed expert facilitators claiming the professional high ground in being able to help participants in action learning. He did, however, acknowledge there may be a role early on for the facilitators in helping a learning set to gain momentum. He was clear that if there was a distinct role for the facilitator, then such facilitators should pay attention to their own learning from taking this role, even forming action learning sets with other facilitators. In the Civil Service programme, the action learning

facilitators met regularly to discuss their experience and as challenges emerged and patterns were seen across several sets and cohorts, so notes of guidance were written up and publicised back to participants. This approach demonstrated to participants that the programme delivery was a dynamic experience for the facilitators as well as participants.

This account was written by one of the set facilitators as a piece of reflection following a learning set meeting.

After our check-in, we spent some time discussing where we were. A and B maintained that from their perspective they had got a huge amount out of the programme but that they could not see the point in doing any writing up. C and D both maintained that the process of writing had been very helpful to them in clarifying their thinking, which B then acknowledged was something she had experienced in the past. I said that I would not pretend to be unattached about the outcome – I acknowledged that I did want everyone to complete. However, I said that I fully respected their right to make a choice about this. I asked A and B if they would be willing to hold off on making a decision and see how the day unfolded and they agreed that they would both be willing to do this.

We started by turning our attention to C's draft and followed it with a session on D's work. I suggested that we could do things in a way that could simultaneously enable C and D to get some feedback to improve the offering, and provide A and B with a sense of what a developed offering might look like. By the end of the session, A and B were saying that they were getting a clearer sense of how they might go about approaching their projects in a more doable way.

After the break I asked people where they were now. B said that it had dawned on her that C and D had found a way to take a big and complex subject, and extract a small, more manageable project from it. She said that this was what she perpetually struggled with – her world was so complicated that she could never get hold of it or get any traction. She went on to say that having heard their examples she was starting to get a sense of how she might approach her project and wanted to take some time to discuss it. As she discussed with the group how she might approach the project she would occasionally interrupt herself saying 'I'm doing it again, aren't I?'. What she meant by this was that, as she was talking, she was catching herself over-complicating the situation and getting lost. I pointed out to her that as I saw things, this was her predicament. I suggested that whatever the content of his project, it could also be about how to get traction in a very complex situation. We continued the work and by the end of the airtime B had a workable project.

I referred to B's experience of catching herself over-complicating things as 'mid-sight' (from a model by Petruska Clarkson). I said I was going to take a risk by suggesting that this tendency to over-complicate things was a tendency which showed up widely for B, not just in this context. Perhaps the experience of demotivation and the sense that she would get nothing from it was actually a defence against doing business with the discomfort? I talked about how action learning holds our feet to the fire, in terms of delivery, as a way of challenging us to do business with 'our own stuff' as well as the external context we find ourselves in. B acknowledged the possible truth in this.

By the end of the session, both A and B had recommitted to write up their work. They also pointed out their pattern of leaving set meetings enthusiastic and then losing this enthusiasm when faced with the reality of actually working on their projects. Having spotted this, they put in place mechanisms for supporting each other, and in the end, both submitted excellent projects.

This account appears to support the proposal of Revans (1984, 14) that by working together to address problems or exploit opportunities, ‘One has to expose one’s perceptions (values, knowledge) to the impartial and merciless criticism of others out of which one may learn to shift that perception. One has to influence one’s colleagues in the set, or be influenced by them even to be involved both ways.’

Client perspective

The Civil Service, as the higher order client, offers a valuable perspective in terms of the emerging outcomes from this programme:

We are really encouraged by what the action learning approach is providing for the Civil Service. Early indications are that it’s delivering tangible results for both programme participants and client departments in helping to build the skills we need to meet the challenges of Civil Service change. As a result of the programme, participants are reporting more sensitivity to business needs, more capacity to intervene with confidence and support challenges to organisation effectiveness and efficiency, clarity about priorities and the ability to work unapologetically in a values-driven way. This shift in approach directly supports Civil Service Reform by helping to advance business effectiveness, increased flexibility, greater focus on productivity and swifter movement to action. Action learning is also a methodology that we work with ourselves and so is congruent with the OD&D Service approach overall, which is important to us.

A review of facilitator learning

Richard Hale concludes . . .

Revans encouraged us as facilitators to share our own learning from taking on this role and I consider my own learning against the three of the Modes of Action Learning Facilitator – *Mobiliser, Set Adviser, Learning Catalyst* (Hale 2012).

A key Mobiliser role has been to provide access to and support for the accredited ALQ/OD Question process. This has been helped by the fact this methodology has now been well tested in practice across a number of business sectors. I was anxious when we were designing the programme to ensure that the client really did want the programme accredited at postgraduate level, and that they would ensure that participants were able to operate at this level. My realisation of the importance of this was borne out of hard-won experience in the past where this had not been stressed and some participants joined a programme

only to find themselves in the invidious position of lacking the essential cognitive and social skills to succeed. In the case of the Civil Service programme, it is clear that a professional process of nomination and selection for the programme has ensured that participants are likely to succeed on the programme. Indeed, business and personal benefits aside, some of the ODQ papers have provided exemplary and deep-level accounts of action learning.

Interestingly, I have not, on this programme, worked in the mode of Learning Set Adviser as this role has fallen to colleagues from Mayvin. I feel that a disproportionate level of emphasis is put on Set Adviser mode because this is the mode which leads itself to the application of techniques and rigid, prescriptive processes which the aspirational ‘expert’ action learning facilitator craves. Thankfully in this programme, Mayvin were able to draw on a very strong team of action learning set advisers, who were clearly committed to the action learning as well as organisational development ethos and way of being. As such, they have been able to apply set adviser skills with authenticity and discretion. My role was limited to facilitation of optional dial-in teleconferences and provision of remote support coaching for individuals. I feel that this actually served an unexpected purpose. I was one step removed from the actual set and the set adviser. This enabled me to ask some quite direct and challenging questions of participants with a degree of convenient naivety.

The most important and most neglected mode of facilitation is that of Learning Catalyst – enabling the client to realise organisational learning and benefits and extending the reach of the learning organisationally and temporally. With this programme, the ODQs are individually framed, the advantage being this places an onus on individuals to take action. However, the risk is that over time, participants may tackle similar questions without drawing on the learning of others. An area I would like to focus on now is to encourage the client to *work* the individual learning which is evident in over 150 significant individual action learning projects. I see this ever growing body of knowledge as providing a tremendous opportunity to support the development of a learning organisation.

What we learn to do, we learn to do by doing. (Aristotle: Nichomachean Ethics, Bk 2)

Note

1. *The Civil Service Reform Plan*, Cabinet Office, HM Government, 19 June 2012.

Notes on contributors

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