

Action Learning:

A powerful tool for the future

“Action learning is a process of collaborative transformation in which members of a social system transform themselves and their social system through participative reflection-in-action”

Passfield (1996)

The George Washington University

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Introduction

Society is changing at an ever-increasing pace and with this evolution comes a myriad of new challenges, challenges that are affecting every facet of our sociological structure (Grieves, 2000). Current research clearly defines (Dobie, 2003; Revans, 1982, Marquardt, 1999) that in order to develop the skills necessary for successfully navigating societies rapidly changing conditions, individuals who are intimately involved with the problems must also be actively engaged in defining possible solutions. According to Zuber-Skerritt (1995), “Accumulated information and knowledge consist of solutions to yesterday’s problems...but in today’s rapidly changing world we must find avenues of learning which continually develop our experiential knowledge that prepares us to deal with the problems of today” (38). Action learning can be a powerful tool in finding new avenues of learning that will help us address our continuously changing society. Research has shown that action learning can, “Increase significant, relevant, and long-lasting learning in relatively short periods of time” (Marquardt and Waddill, 2003, 406). The aspect that makes action learning such a powerful device lies in its capacity for simultaneous learning and problem solving. According to Pedler (1997) “There is no learning without action and no sober and deliberate action without learning” (23). Action learning, in the words of Zuber-Skerritt, “Offers a pragmatic response for managing problems effectively and learning in the twenty-first century” (2002, 115) and can be used as an effective tool for addressing a wide variety of challenges. With the intent of better understanding the process of action learning this paper will briefly focus on: the historical advent and definition of the process, the key elements of the of how it works as well as its objectives and outcomes, and a brief description of where it’s currently in use.

Historical background

Action learning is a concept that originated from the methodology developed by Professor Reg Revans in England in the late 1940's when he was working as the director of education for the National Coal Board. During this time period Dr. Revans developed a theory that managers who were experiencing various problems from within their organization might benefit from communicating with each other and actively implementing the culmnative suggestions generated. From his experience he found that a group of people who worked together to help one another solve problems was a productive way to provide inspiration and direction with difficult problems. Revans defined what is now commonly referred to as 'action learning' as follows: "Action learning is a means of development, intellectual, emotional or physical that requires its subjects, through responsible involvement in some real, complex and stressful problem, to achieve intended change to improve their observable behavior henceforth in the problem field."(Revans, 1982: 626-7). Revans realized that people are generally more motivated to learn when they're working with an issue that is important to them. It was his belief that people who exist in a world continuously subjected to change need to become masters in the art of posing questions because nobody knows 'what is going to happen next.'

Asking probing questions to solve problems or to improve the quality of life is not an overtly innovative practice. Thousands of years ago, Socrates used what he described as the 'questioning technique' as the main strategy for his own learning and as a technique for working with his followers as well. Even though Revans introduced the concept of action learning amongst the coal workers of England in the early 40's, he never operationalized the process into a standard learning approach (Marsick & O'Neil, 1999). Rather, the writings and research of theorists such as Senge (1990), Weinstein (1995), Marquardt (1996), ZuberSkerritt (2000) and others have developed the concept and brought greater attention and popularity to the notion and

practice of action learning not only in Europe, where it originated, but worldwide. (For a comprehensive list of readings, refer to Appendix B)

Objectives

Although there have been a number of different action learning models emerge over the last 60 years, most theorist, practitioners and researchers who work with the process agree on the basis principals of the action learning model. Several researchers concur that action learning describes a process, which provides well-tested methods of accelerating learning that enables people to manage difficult situations (Marquardt, 1996; Zuber-Skerritt, 2000; Conger & Xin, 2000). According to Marquardt and Waddill (2003), the main objectives of action learning is to resolve complex problems or challenges while simultaneously developing the knowledge, skills, and values of individuals and organizations. Research conducted by Weinstein (1995) is very similar in its definition, “Action learning’s prime strength is that it helps people focus on the practicalities of their everyday lives, and gives them an opportunity to do something about the issue that concerns them - and learn from experience” (41). Pedler defined action learning as an, “Approach to the development of people in organizations which takes the task of the vehicle for learning. It is based on the premise that there is no learning without action and no sober and deliberate action without learning... Action on a problem changes both the problem and the person action upon it.” (xxii-xxiii). Researchers from a variety of disciplines (Marquardt, 1999, Senge, 1990, Revans, 1982) concur that action learning is a process, which can be successfully applied to a variety of different situations if the participants following certain key elements that define the parameters of the process.

Key Elements

A variety of studies conducted by researches from a mixture of business and human resource related fields (Marquardt, 1999, Pedler, 1997, Revans, 1982) have concurred that there

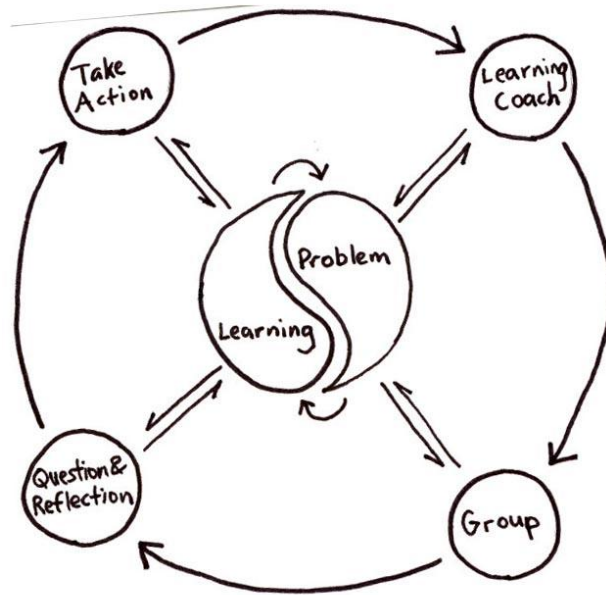
are a number of key elements that define the parameters of the action learning process.

Marquardt (1999) in his book, *Action learning in action* describes what he defines as the six key elements of action learning, which are: first, there must be a shared purpose and understanding of a “real” problem and that the individuals involved must have a vested interest in solving it; second, there are certain roles that must be accepted and administered within the group; learning coach, problem presenter and group members (4 to 8) working as ‘fellow leaders’ in the process; third, each action learning activity is comprised of three inter-related processes: questioning, listening and reflecting; fourth, group members may only engage with the problem presenter through questions, not statements and must be actively engaged in a ‘reflective inquiry process;’ fifth, the group must focus on the development of certain strategies and be committed to the learning aspect of the process; and sixth, they must commit to take action on the suggestions generated by the group. Marquardt (1999) further describe how these sixth key elements of action learning also contribute to the building of critical leadership skills in seven key roles, namely: systems thinker, change agent, innovator, servant, polychronic coordinator, teacher-mentor and visionary.

Other researchers have established similar key elements, such as Zuber-Skerritt (2002) who state, “[Action learning] participants must agree to a certain standard of expectation, expectations such as a commitment to the process, collaboration amongst team players, trust and openness and a tolerance for mistakes, and a mutual respect for differences, talents and needs” (120). Zuber-Skerritt (2002) go on to further describe action learning as: learning by doing, experiential learning, reflecting on practice, being open, sharing ideas, collaborating, synergy, learning to learn, life-long learning, and learning in the workplace. Similar in many ways is the work by Chesterland (2002) who found that feedback from others involved in the action learning process is a critical component, and the results that stem from the problem-solving actions are a critical resource for continued learning. According to research there are a number of key

outcomes which are directly associated with the action learning objectives: developing leadership and human capital, generating complex problem solving skills, and the empowerment of individuals in responding to change.

Action Learning Model



[Source: adapted by Holliday from Marquardt, 1999]

Outcomes

Developing Leadership and Human Capital

In today's rapidly changing world, leadership development has become a major concern for nearly every organization. Marquardt's (2002) research has found that action learning is not only a powerful tool for solving real problems, but it also provides group participants with the leadership skills and self-awareness required to help the organization develop and adapt to a changing environment. Action learning is not simply a process used to develop leadership and improve results, but also serves as a medium for supporting organizations in developing their 'human capital' (Schwandt & Marquardt, 2000). Studies by Zuber-Skerritt (2000) found similar

results, “Action learning also gives priority to human factors such as values, organizational culture and processes of learning and work improvement and will achieve better products, services and financial profits in the long run because these human factors generate better understanding and motivation on the part of the people involved” (114).

Creating Learning Organizations

Also well reported in the literature is the need for organizations to move towards becoming “learning organizations.” According to Garratt (1987), “The ability to learn about learning and become masters of the learning process is the critical issue for the next century” (23). Indeed, some researchers indicate that the level of learning in organizations may in the future become the only differentiating factor between successful organizations (Miller, 2003). Senge’s work with organizational development led to his belief that the need for understanding and learning is greater today than it has ever been in times past. As such, it is not surprising that organizations are seeking new ways for developing their capacities for becoming ‘learning organizations.’” According to a variety of researchers across disciplines action learning is a process that provides a strong foundation for introducing and supporting learning in the work place (Marquardt, 1999, Dobie, 2003; Revans, 1982, Smith & O’Neil, 2003). Similar to Massey and Walker’s (1999) work was that of researchers Smith and O’Neil (2003) who also found action learning to be a wonderful tool in helping generate learning communities by fostering the development of reflective practitioners. They found:

The ability to think things through and de-brief experiences at non-trivial personal and contextual levels is increasingly recognized as essential to effective learning and performance. Action learning is a well-proven individual, collective and organizational development philosophy that provides a sound setting for such reflective inquiry (Smith and O’Neil, 2003, 155)

According to Peter Senge (1990), learning organizations are “organizations where people continually expand their capacity to create the results they truly desire, where new and expansive

patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together” (3).

Generating Complex Problem Solving Skills

Research on action learning has shown that part of the development that occurs at both the team and individual level is an increased ability to foster self-awareness and understanding, develop critical reflection and reframing skills that allow the individual(s) involved to examine “taken-for-granted” assumptions that prevent them from acting in new and more effective ways, as well as developing questioning and problem solving skills (Conger & Toegel, 2003, Marquardt, 1999, Marsick & O’Neil, 1999, Pedler, 1997). According to Edmonstone (2002), “tackling the problem will not only move the present situation forward, but will also contribute to individual and group learning about how work is done on other problems” (288). Further studies by Zuber-Skerritt (2002) have found, “action learning recognizes the possibility for learners to generate knowledge rather than merely absorbing passively the results of research produced by specialists” (114). According to its developmental capacity for those involved, “the action learning process is essentially developmental in that it encourages creative, innovative thinking by asking open-ended questions about how to improve or recreate that which matters to us most” (Zuber-Skerritt, 2002, 115).

Another added benefit of action learning is its ability to stimulate creativity. Through Conger and Toegel’s (2003) work they discovered that the more individuals were able to connect unrelated events to the current problems they were working with, the more they were able to generate creative solutions. They go on to state, “In essence, action-learning instructional formats achieve this outcome by presenting learners with complex situations that parallel events they will encounter in their work” (73). With regards to the important role that action plays in the process, in ASTD’s *Action Learning* booklet (2001) it states,

Action learning groups should have the expectation and responsibility of carrying out their ideas and recommendations. Merely preparing reports and recommendations for someone else to work out results in diminished commitment, effectiveness, and learning on the part of group members” (8).

Fostering an individuals and/or group’s capacity to find creative solutions to “real-life” problems as well as encourage them to act on those solutions empowers them with the tools to be successful change agents not only individually, but collectively.

Responding to Change

There is a substantial body of research that supports the contention that in order for individuals, groups and organizations to be prepared in dealing with rapid changes in the 21st century, there are certain strategies and processes they will need to be familiar with if they are to be successful. Based on an extensive literature review of organization development, Grieves (2002) concluded that in the 21st century there are two themes likely to dominate the change process, namely learning and reliability. He cites action learning as one of the processes capable of dealing with such themes. Along the same lines is Strata’s (1989) research which states, “the rationale for the rapid adoption of the action learning approach is based, in part on the realization that in a rapidly changing environment the rate at which individuals and organizations learn may become the only sustainable competitive advantage, especially in knowledge intensive industries” (1989, 64).

Action Learning in Organizations

There are currently a wide variety of organizations both nationally and internationally who are using the action learning process. Recently the Global Institute for Action Learning, in conjunction with Management Concepts, hosted it’s first annual action learning summit. During the presentation Dr. Michael Marquardt, a leading proponent and instructor of action learning, explained that the process itself has been around for nearly 60 years, but had really become mainstreamed during last 10 years. He stated that nearly every part of the world, type of

industry, and/or form of organization is or has used some form of action learning. A few of the organizations that are currently using action learning are: Booz, Allen, Hamilton, Constellation Energy, DuPont Corporation, Fairfax County Public Schools, Sodexo USA, The United States Department of Agriculture, and the Xerox Corporation. Each of these organizations represent a different facet of society (ie: business, government, consulting, education) and each of them have successfully contoured the fundamental tenants of the action learning process to meet the objectives of their particular situations. (Refer to Appendix A for more details on the individual organizations).

Conclusion

We are living in the technological era of the 21st century and as such must constantly strive to acquire new skills and abilities that enable us to deal with the consistent evolution of our society. As fellow members of this system, be it business, education, government or the like it is our responsibility to acquire the skills that will prepare us to face the challenges of the future. Action learning provides a framework for structuring such an undertaking. It's process supports the opportunity for leadership development and change management, fosters individual and group problem solving skills, and develops learning organizations. Individuals, groups and organizations can be empowered to deal with the endless effects of a changing society with the help of action learning. As Passfield (2002) has said, action learning is a process of collaborative transformation in which members of a social system transform themselves and their system through actively engaging in the reflection-action process. Action learning is a transformative process, preparing it's participants for collective, collaborative change.

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Appendix A

Booz, Allen Hamilton- Vernita Parker-Wilkins, Executive Development Program Manager

Where and how is Action Learning (AL) being used in your organization?

When we took a look at our HR data, we found that new hires at executive levels had lower retention than those promoted within the organization. Originally we considered individual coaching as a possible retention tool (Chuck Appleby), and what I liked about the model is that it combined coaching with AL. We divided our new hires into groups of six and each month a specified individual in the group was assigned to bring (present) a specific leadership challenge to the session. It provided them the opportunity to build relationships, foster collaboration, and provide supportive, meaningful feedback. It was also cost effective; approximately \$72,000, for combined coaching and AL. This type of program requires accountability for reporting back to the group as well. VP guest speakers also come to address the participants from time to time. During the AL demonstrations, the presenter also reports how they've been helped and described three specific actions he/she will take over the course of the next few days to address his or her problem. Booz, Allen, Hamilton has been using this combination of AL/coaching for about a year, to address the issue of orientation and retention of new staff hires. We also use executive coaching to sustain the learning. There has been a focus on acclimation and acculturation. We have a multiple group meeting every Thursday from 12-2 pm. On our company website we also have a list of employee coaches.

How did your organization build the support and momentum for AL?

Chuck Appleby came in and led a leadership development AL group. We've had tremendous growth and we needed a tailored way to build the pipeline, to increase collaborative skills and build bench strength. Action learning appeared to be a successful model that seemed appropriate for our needs. It was critical to have senior level support so we got partner sponsorship from the top-level of the organization. He sent an email to the other partners to let them know about this, did write up in quarterly NL, and sent information to each new hire regarding the expectations and time commitment of the program. The chair of the governance group also bought into it. A partner actually kicked off the initial session and explained what the long-range value could be for the individuals involved as well as for the organization. We often bring in VPs to speak, so part of the goal is to bring in other executives, to build relationships across the organizations. AL and Exec Coaches also sit in on sessions; providing context for one-on-one session. Such interaction has really built a network of support. With regards to continuing the momentum, there were times participants couldn't attend the session, but they made conscious efforts, formed relationships, became accountable to each other because they knew that they had to report to each other and be responsive and responsible. This understanding of accountability has made for an increased level of commitment. Now we're looking at opportunities to link it to the competencies. "Socialization" is one. We will use the AL methodology at a leader's conference.

Are AL teams working to address one organizational challenge, or is each team member working on a challenge of his/her own?

For this intent of this particular assignment, retention and leadership, the groups focused on individual challenges.

What results and observations can you share about the impact of AL?

At the onset of each new AL group, we speak with new hires and to one or two of their supervisors and/or peers, and all do pre-assessment. How are they doing as a leader? Do they have increased listening skills? Are they less directive? Then we come back to the same people after completion of the AL experience and conduct a group value evaluation (based on their investment in the program, what value did they think such interaction brought to the organization.) Some said they decided to stay at BAH as a result of their experiences in the action learning groups. Some of the feedback was that they felt they had developed better listening, feedback and questions skills. This type of questioning model forces people to think through how to question someone about an issue, rather than simply being directive. Some of the individuals who initially began the action learning training “with a few rough edges”, were forced to be more questioning in their approach with others, and as such, developed a better rapport with their peers and fellow staff members. A key skill that action learning has developed within our organization is the ability to collaborate. It builds a model for collaboration skills by providing opportunity to network with others colleagues across the organization and overall retention is also increasing. The biggest challenge thus far has been attendance. If a client calls you have to take care of that first. People have pre- and post-assessment interviews.

Other questions/comments?

What kinds of individual changes pre- and post.

AL is being evaluated through the process. 2 groups have been completed. 3 are in the process. There are 2 separate checkpoints, one in the beginning and one in the end, as well as lessons learned. Executive development context. We have IL courses, with specific competencies at each level...as well as coaching for each level. We use the Harvard on-line learning program. We also have formal networking for executive staff. Annual principals conference—network across sectors. Some skill building. WE will use AL as a part of the Principals conference this year. Many leaders and facilitators will be required to work with 2-300 principals. Also a Principles Challenges program, an opportunity to network with peers across the entire form. Thus we have formal programs for this. We are also during long term surveys looking at the value investment. I cannot give you a definition, but not ROI; we’re looking at Cost, Value, and Risk.

How does BAH share knowledge?

Primarily we use AL for new hires. We are actually looking at how to pull the learnings together to integrate senior hires in the firm; pull together and repurpose. In a couple of instances with client-facing teams, we are working with an external vendor (Greater Enterprise Consortium) as a group was experiencing growth and needed to build management pipeline. An 8-person group was a way for the group to build relationships and be more collaborative. This also incorporated coaching as well. We also used some folks from my team to work with functional groups in the organization at the Director Level. We brought in technical directors who were promoted because of their technical expertise who needed enhancement from the leadership side. We did a 360 at the onset of the course, and repeated it at the end, in addition to LD modules.

Constellation Energy Power Generation- David Brzozowski, Director – Employee Development Unit

Where and how is Action Learning (AL) being used in your organization?

Our 3 divisions were merging and we were trying to create a more unified culture. AL was actually a way to bring people together through the merge. AL is a tool for leadership development. We started AL with all supervisors and then trained over 150 in AL. We now have 50 in house AL coaches. Constellation uses AL for team building and problem solving. It has been using AL for about 13 months to address a host of company problems. Constellation offers 2 day AL training to a variety of staff and has trained 50 internal AL coaches who are available internally to help additional company units or plant managers in dispersed geographical locations to adopt the methodology. Examples of how AL has been used by Constellation:

- Preparing a storm emergency plan
- Addressing disparate HR policies
- Addressing balanced scorecard issues
- Solving everyday problems at plant levels (security, eg)

It's a segment of the leadership development program. AL is phase one. We focus on high-performance teams and AL. Marquardt comes in and does a session. People come in and pick a leadership competency they want to work on. They bring a problem. For example, how to roll out a wellness program. It's not an overnight process. It slows down the extraverts and helps the introverts. The I's have better questions. The coach keeps control.

How did your organization build the support and momentum for AL?

Syn fuels started it. There was a retention problem. Distressed assets were bought, but tax breaks were scheduled to end (threatening the business), so retention was an issue. We worked with high-performance teams and culture integration. We had 85 HR problems, and AL was the foundation of our leadership development program. The action learning coaches were trained. All plants now have an AL coach, 50 coaches all together. The coaching training includes an action learning workshop, focuses on presentation skills, and participants are to bring a "problem of the day." On the company web site they post success stories from the various action learning sessions.

Are AL teams working to address one organizational challenge, or is each team member working on a challenge of his/her own?

People bring individual challenges. For example, a plant manager brings a specific problem from his plant, then returns to make the changes.

What results and observations can you share about the impact of AL?

One executive walked by the AL room and heard the questions, and asked, "What's that?" Now, other parts of CEG want to get involved. It's connecting with 6 sigma. We have an AL team for how to sustain the results, and then we evaluate the results. People really enjoy being on the teams. Asking questions does not make people judgmental. Questions are not threatening.

Action learning has broken down barriers between management and has assisted in team building. A hundred percent of our leadership has been exposed to some aspect of the Action Learning process.

DuPont Global Learning-Bill Kotkin, Manager

Where and how is Action Learning (AL) being used in your organization?

It all started several years ago with a leadership development effort and change process, going from a product culture to . . . what? At the time it was unclear. We had to grow, and were looking for a specific leadership tool that would support us in this endeavor. Dupont is a 200 year old corporation which has used many management tools over the years to improve performance, quality of product and to develop staff, but we have had to change the culture from science and technology and in order to do so, really needed a strategy to help us do that. Dupont has been using AL for the last four years primarily as a succession planning tool and as a method to change organization culture; the trickle down effect (start at top). For example, using it at plant-level with HR leaders as a training tool for first-line supervisors. The concept was originally introduced by the CEO himself who-driven by change in global economy—recognized the need to address, “leadership for growth.” The initially action learning training sessions focused on training the top 400 staff members of the company and entry to the program was very competitive. Dupont began with a 3-4 week program, but it has evolved into a 3-4 day intensive start, followed by six months of periodic meetings. Dupont has since modified AL to meet its need to select future top executives. Each participant is rated on his/her individual performance even while the team product or solution is also rated competitively. At this point, Bill would like to extend the action learning session to mid level operations. We’ve tried to follow the model as closely as we could....but realize we also have to be flexible...adapt the model to “real world.” Part of that was blending six sigma with parts of action learning, and emotional intelligence was part of it as well.

How did your organization build the support and momentum for AL?

Support from action learning has stemmed from it’s development of succession links and of course the continued support of Dupont’s CEO’s. Originally, the CEO took 3 days with 40-50 people to teach this concept of action learning and those involved were very motivated, because succession planning was involved. People were actually rated on their performance in these groups. In many senses it’s very competitive. 360-degree performance evaluations are required as part of the process as well. With regards to momentum, the question was broached during the presentation, “What happens when the group’s recommended actions fall outside their area of responsibility?” Bill explained that 6 sigma requires a feedback loop so at least people know why something wasn’t acted upon.

Are AL teams working to address one organizational challenge, or is each team member working on a challenge of his/her own?

Both individual as well as organizational challenged are worked on in the AL groups.

What results and observations can you share about the impact of AL?

People have to experience action learning to truly understand it. Sometimes organizations have to do it in skunk works, but the results show. All CEOs have big problems – use those. It's more the mid-level people who worry about the power. Those who use it do better. If the leaders don't do AL, then it won't work. The next step is to replicate the process in mid-management people, get them earlier in their careers. The testimonials in the company speak to the great impact that action learning is having on the organization. Phrases such as, "Best development experience of my career," and "Lots of value in leveraging and learning from others." One team, when finished with a project, said, "We're not done," and wanted to carry on and do more. They went to the CEO and asked for a problem they could work on.

Fairfax County Public Schools-Geri Lee, Executive Administrative Assistant to the Division Counsel

Where and how is Action Learning (AL) being used in your organization?

FCPS uses Action Learning (AL) for at least two distinct purposes. For support workers, (bus drivers, custodians, foodservice workers, office/clerical workers) AL is used for team building and leadership development. For management in the Superintendent's Office, it is used for problem solving and leadership development.

Action Learning, at least with regards to my experiences with it, focused on support services employees. There was an initial application process and 170 were selected to participate in the AL sessions. From this number 17 cohorts were formed comprised of teams of 4-5 individuals in each group. There were 10 sessions which were held all-day from 8 am –4 pm, one to two times a month. All the meetings were face to face and each of the participants took turns being the action learning coach. The coordinator selected the problem/challenge then the groups worked to define the problem. Results from the sessions were advertised through the counties monthly newsletter which is only available to a certain support grade level.

FCPS has used AL for about three years, and the use is expanding. With regards to the support workers, the issues/problems were supplied by the career development office. Team building is a major focus, and the small amount of problem solutions accepted by the administration does not seem to weaken the process or the AL teams motivation.

How did your organization build the support and momentum for AL?

Support employees at different levels were given the time to discuss and work on possible solutions to day to day problems. The process was said to have enriched their job satisfaction, opened new opportunities for advancement, and empowered those involved to actually propose action for change or at least have such options given serious consideration by the Superintendents office.

What results and observations can you share about the impact of AL?

After the working in the groups, many felt the sessions had been productive and that their groups had worked well together; a first for many of them. In fact, I still communicate with many

members from my group. It's created new contact points in different organizations across the county. With regards to the reflection component, after like three sessions, we were amazed at how well we were doing and how much we were learning. Some of the challenges with regards to the implementation was:

- Fear among participants that it will be painful, ineffective, boring
- New initiatives coming in October, 2004 will apply AL to system problems
- Just getting to know and feel comfortable with the other members of the group
- The use of AL is but 3 years young

Sodexo University/Revans University-Harry Lenderman, EdD., Dean of Sodexo/Revans University

Where and how is Action Learning (AL) being used in your organization?

Sodexo is part of the Marriott Corporation and is responsible for the learning of the company. A corporate university has been a company goal for awhile. It started in England. We looked at Covey's principle: Circle of influence. We called it a pilot program whose support stemmed from the senior operational vice president. One of our core beliefs is that learning is more than an event, it needs to solve organizational problems (Book vs. Problem Solving). Developing a Corporate University was a priority; we needed to develop a system where we could solve own problems/challenges "in-house".

Sodexo has a large number of minorities students who are working their way up the corporate ladder in their organization, but many have no degree and as such believe that there is an educational glass ceiling. We have broken the educational glass ceiling, offering people a degree by solving company problems at work. According to Henry Mintzberg "You can't create a leader in a classroom." This type of corporate university gives employees the ability to earn a degree at work through using the process of action learning. An initial investment of \$300K was made to university and thus far 37 degrees have been delivered. Sodexo used Dr. Marquardt's concepts to get started. We start with Marquardt's six steps; these principles of action learning serve as the curriculum basis for the program. Business problems are solved in less time; when those who are working on them become a surrogate owner. Often the first problem which identified tends to be very large such as world hunger. Then the business coach helps them generate a more reasonable problem and the facilitator makes sure that the academic standards are met.

How did your organization build the support and momentum for AL?

This is not the only route to a degree, but it may be the only route to a degree for some students. Some Universities do not take our studies, but the program represents the company's commitment to take responsibilities for for both the individual learner as well as the collective learning of the organization. Our intent was not to create a dependency model. Lower level employees are given both discretion and resources. The degree can be worked on during normal working hours, specifically focusing on real work-life issues. The union has participated as well, paying for a number of their members to participate.

What results and observations can you share about the impact of AL?

Action learning has helped us to solve company's software installation, training and development of staff (custodians). We also worked w/ school districts to produce used 20 video vignets (Sr. High School Project). The videos included training lesson plans which: resulted in greater attendance, alignment of corporate goals, better leaders/communicators, and people were more motivated to learn/took charge. From our work with action learning we believe that action learning can be used in any level of an organization. Some of the lessons learned were that even though you're training individuals in organizations, not all those involved understand the concept of self-directed learning. Also, in order for action learning to be truly successful, the right people need to be involved.

U.S. Department of Agriculture-National Agricultural Statistic Service-Dr. Linda Raudenbush, PhD, HRD/OD Specialist and Leadership Coach

Where and how is Action Learning (AL) being used in your organization?

My background is in HRD and OD. I am familiar with an array of methodologies and interventions. I analyze data. We originally began with LD Workshops but what were doing was not translating into how to become better leaders in the workplace; and this is where AL came in. We made the business case for Action Learning over several years, pointing to the 360 degree assessment which revealed a lack in skills and showed action learning would develop them. We also did a pilot that showed success, and used it as a leverage device with the Executive team. We have now been using action learning for 4 to 5 years as a tool within our leadership development program for our managers. Over an eight months period, one month intervening, we had five, one day action learning sessions. Some of the issues addressed were: managerial competency issues, staff not working well together and some of the steps we took. We originally explored the idea of using action learning as a tool to solve a variety of problems, survey specialist problems, leadership development; intervention for special purposes; management and team problems, etc. In IT they had areas where they wanted to get better—help desk. My first motivator was aligned with the leadership development; I believe in AL. I knew that our technically oriented managers could really use through AL. I went to executive board of the organization 3 times before I received the go ahead. Being a relatively small company we were able to train each of our 10 executives and they have each used action learning in their own divisions.

How did your organization build the support and momentum for AL?

First, we gained the support of top management. Originally the senior management was relatively neutral on the possibility of using it, but when the results from 360 demonstrated a variety of organizational concerns, AL was brought on board. Next, they conducted preparatory workshops; 45 minute sessions that focused on individual problems, followed by brief discussions. The third strategy was to choose projects, problems and challenges to work on in the groups. The IT specialists were very receptive, but the statisticians were more reticent.

What results and observations can you share about the impact of AL?

Action learning stimulated learning and change not only in those who participated in the group but it also had an affect on those that interacted with the group members. Developing shared knowledge was also one of our objectives as well as developing leadership competencies. In the other two, we asked how we could nudge forward in a fractured system. The IT part was the recognition that we have to get closer as a team and we wanted to attack problem areas with a problem-solving technique. We measured the results from our action learning sessions by qualitative and quantitative data. We performed a 360 before and after to evaluate the success of each session. Informally, we measured the 1st group of 16 and nearly all of the participants of this group have been promoted. According to my experience, the transfer that occurs from traditional training programs is lower in percentage than the transfer that occurs with AL. Did I do a strict research study? No. I used the OPM leadership competency model to identify those skills that were not being transferred from traditional interventions, and I believe that AL helps to transfer them. We did qualitative and quantitative evaluations of the action learning model, a mini-longitudinal study. Our results indicated that the method had high-rate of transfer.

Xerox Corporation- Christopher Comparetta, Manager, Productivity; Carla Kinder, Platform Transition Leader

Where and how is Action Learning (AL) being used in your organization?

The Xerox Corporation was bankrupt and were losing market share. We were working with managers to increase productivity of managers. We did an organization-wide survey, “what is standing in the way of productivity.” One of our VPs said, “I know what is going on. We’re attacking the new problems with the same old solutions. I want leaders, not managers.” He then referred to the Centurion Project (Phillips in Netherlands), which was AL. In May of 2002 we were asked to start up a leadership development program using action learning while the corporate university was gearing up. Productivity was the challenge. We had 24 employees who participated in this initial process and our goal was to improve productivity and help managers learn new leadership skills through improving their dialogue, questioning, and insight- skills. We met for a half-day, twice a month, for over a year. We were looking for increases in productivity and behavior change. So I asked a set of people to bring in productivity challenges, but the expectations were that they would develop leadership skills, also helping them to be reflective. Take out your day-timer and tell me how much time you spend thinking. We also talked about dialogue skills. We did not teach leadership skills. We helped them discover how to learn. Between 2002 through 2003 we have had 4 sets of 6 come together for AL sessions. This time together is not training; it is time to work through problems. The sets meet 2 times a month for a full day each time.

How did your organization build the support and momentum for AL?

When it was first introduced, several executives were on board and other came along as the process continued. The division president is also now on board as well. We established four groups with six each. They were mixed groups, but the camaraderie worked. Support was generated as the groups began truly working together. We found once the individual behavior changed, the system changed. They realized they were part of the problem.

What results and observations can you share about the impact of AL?

The initial action learning program lasted for about a year. They participants learned techniques in the set that they could apply outside the organization. There were trust problems, but they worked through how they were going to make an impact on trust, morale. They picked up on the fact that coaching was pretty cool. That the skills they were learning could be used to help cross-functional groups solve problem. During the sessions they had the opportunity to ask powerful questions. They were not going to experts for the answer (has all to do with the past, not the present/future.) They need to discover for self became a powerful motivator. The results were favorable. People that participated felt that they have learned a lot. Those managers who participated have moved up into higher positions. Action learning is something you have to experience. We also found that having the sessions off-site was important. We're now piloting our action learning session using 6 sigma. If you think about problem solving, this IS the way we learn.

Other questions/suggestions?

How closely did you follow Marquardt's Action Learning model?

I took a lot from him. We have differences on the role of learning coach. Mike has a strong role for learning coach. We want each member of the group to become a learning coach, rather than depend on an external. We also acquired questioning techniques from VITAL SMARTS; something they call crucial conversations. We also deferred to Christina Weinstein's book, ACTION LEARNING A PRACTICAL GUIDE For MANAGERS.

What are the skill set of the learning coach role that you utilize and how did you convey them?

We focused on questioning and insight. Pointed out differences between training and learning...we harped on reflection. Everyone was asked to have a learning journal to stimulate reflection. There is the what do you know, what don't you know, what is causing to wonder, and what is the insight. It's a process that does not take long to pick up on. They used the techniques for productivity and for other life and work problems as well. In the beginning, we told them not to give solutions, gave a good set of example questions. Later, they started to ask question to imbed the solution. Then, most powerfully, they let go.

What role do the learning coaches play?

They create psychologically safe learning spaces. It is admitting that you don't know something. I don't think fast on my feet...they expect me to have an answer...and what if you come up with the wrong answer, better to say I need time to think. One challenge we have at OPM is to tackle issue that executive presents; they want perfect solutions that offer no risk of failure. If you create a risk-free environment, how can you learn? Can you make it safe to fail? We were lucky because the sponsor learned early on is for people to learn and for behavior changes to happen. The champion had a vision for learning. What makes safe to fail. When you are on the path to discovery, you sometimes need to take action, even though it will fail. If learning is the most important, they will learn to find the right solution. We are going through many changes; you have to do a little digging before you find the gold mine.

Appendix B

Comprehensive List of Readings in Action Learning

[Dr. Michael J. Marquardt](#) has assembled a comprehensive list of essential books, articles, reports, and other information related to the theories and practical applications of action learning and closely related disciplines. This list is shown below in alphabetical order.

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