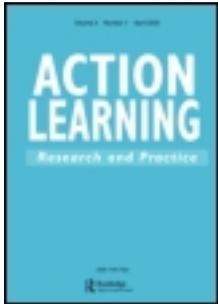


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ACCOUNT OF PRACTICE

The leadership crisis – can Action Learning Questions provide any answers?

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This article provides a reflective account of the author's experience over the past 12 years of introducing a structured approach to accredited action learning to corporate organisations. The generic Action Learning Question method is outlined and specific examples of programmes in the financial services/banking and education sector are described. Included is an example of how Action Learning Facilitators have been developed. It is proposed that this approach has a place in supporting leadership development in a period of great uncertainty and change.

Keywords: action learning; action learning facilitator; leadership; learning organisation; Action Learning Questions

I was invited to join a round-table event recently focused on the theme of 'leadership in crisis' attended by senior HR professionals. In the introductions, several participants referred to recent changes or additions to their job titles which were causing them to question what their role really was. Included were terms such as 'culture' and 'organisation development' and 'talent'. None were called 'manager' or 'officer'. I enjoyed the format of the session. Rather than the tired conference model of a supposed expert, consultant or academic battering the audience of unwashed with Powerpoint slides and statistics, it was more of an action learning style discussion. We were seeking to explore, with the help of a facilitator, the challenges we faced in our various roles relating to leadership identification and development. We were asked if the current model of leadership development was broken. I reflected on the fact that many of the major institutions I have been conditioned to look up to in terms of leadership seem to be in crisis; government, education, church, police, the law, public services, media and banks.

As I have over the past 12 years been developing an action learning-based approach to support leadership and organisational development I was prompted to reflect on my own experience and learning which I would like to share in summary here (Carrington 2002; Hale 2003a, 2003b, 2004, 2012a, 2012b).

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In 2000, I was invited by International Management Centres Association (IMCA) to help refresh its approach to the provision of accredited action learning-based leadership programmes. IMCA was founded as a professional society in 1964 by graduates of Britain's earliest business schools, and launched its own action learning programmes in 1982 with Professor Reg Revans as its inaugural Chancellor. It is unique in being the only business school dedicated to providing action learning-based qualifications for leaders and managers. I had been drawn to IMCA due to its organisational focus which, to me, having spent my career in the corporate world of management training and development, made a lot of sense.

About the same time as taking on the challenge of refreshing the IMCA approach I had been asked by a leading UK bank to refresh its approach to leadership development. They had grown tired of classroom- and knowledge-based management programmes and wanted to ensure that the new approach should lead to real change in the business.

So I asked colleagues at IMCA, many who had worked with Reg Revans, how he might have responded to this dual but related challenge. This led to the development of the Action Learning Question (ALQ) method which has now been introduced to many organisations and sectors, including financial services, construction, childcare, central government and global outsourcing.

ALQs are short-term organisational projects tackled over 90 days by action learners with support from an action learning set. ALQs are underpinned by Revans principles and take the following form:

- There needs to be a real organisational challenge which leaders can address. Therefore, this is a business-driven approach to action learning as outlined in the umbrella framework of Kozubaska and Mackenzie (2012).
- There is a strong focus on 'Learning with and from others' in a learning set.
- Rather than teaching knowledge to managers outside of the work context, the emphasis is placed on encouraging the development of insightful questioning leading to focused research and inquiry driven by the problem holder. This is done through a group action learning process called Knowledge Mapping, which is briefly described at <http://www.youtube.com/watch?v=cAahLNFxur8>.
- ALQs have to involve action on the part of the action learners. A key role of the facilitator and the learning set is to ask the problem holders what they have done and what they will do.
- Accreditation – ALQs are accredited at either undergraduate or post-graduate level. Participants tackling ALQs are required to write up or present a reflective summary of how they shaped the question, their research and their personal and professional learning. This effectively

provides a ‘currency’ for action learning of personal value as well as a healthy degree of peer pressure to ensure momentum is maintained.

This ALQ approach contrasts with the traditional MBA approach to management education which Revans described ironically as standing for Moral Bankruptcy Assured. The thinking behind the design of ALQs can also be seen as aligned with the thinking of Mintzberg. In his book *Managers Not MBAs* (2004) published four years before the collapse of the global banking system, Mintzberg provided a detailed critique of the dominant Harvard case method suggesting that the focus on promoting intellectual wit rather than leadership practice had led to serious flaws in corporate leadership. There is a parallel here with Revans’ distinction between ‘cleverness’, which he saw being promoted by the emerging business schools in the 1960s, and ‘wisdom’ which he associated with insightful questioning between ‘comrades in adversity’.

Since launching the ALQ approach it has been adopted across a number of business and organisational sectors. Depending on the sector and target participation group, the title of the process has been adapted accordingly, so there are now organisations working with Leadership Questions (LQs), Continuing Professional Development Questions, Organisation Development Questions and for the development of action learning facilitators, Action Learning Facilitator Questions (ALFQs). Here, I share some reflections applying the ALQ process to support leadership development in two sectors:

- The financial services sector where I have introduced the approach to three major UK financial services organisations, including pre-recession and nationalised post-collapse national banks.
- A major UK education provider to the corporate sector and public.

LQs in the financial services sector

When I was asked to provide a fresh approach to leadership development in a UK financial services organisation and bank, the learning and development team had been asked to research best practice in leadership development. They had identified three themes as particularly relevant to their own organisation:

- The recognition that good leaders develop leaders.
- The importance of taking an external perspective, comparing the practice of other organisations with their own.
- The opportunities that accreditation of learning provided for focused leadership development.

A steering group was formed, chaired by an executive director to oversee the design and operation of the programme. This led to the design and delivery

of a company based, externally accredited Masters degree programme structured around the completion of eight 'LQs' over a period of two years.

The programme design included quarterly workshops attended by all participants. These were focused on a theme decided by the steering group, and informed by the participants which was identified only a month or two ahead of the actual event. This meant that real issues concerning participants could be tackled in real time, rather than making assumptions at the start of the programme regarding what might be good to include. So, for instance, in the first year of the programme, the organisation was planning a major relocation project within the city. This was a concern for all members of the organisation including the leaders who had to cope with the emotional stress of staff facing uncertainty and change. It was identified that a major hospital located in the same city had experienced similar challenges when relocating and commissioning its services in the same city. A leader from the hospital joined the workshop and the bank's leaders were so enlightened by the fact that he had faced similar challenges albeit in a different context that they invited him to join their relocation working party. For the hospital manager, he was surprised and motivated by the fact that he was able to contribute as a leader in a very different sector.

Action learning sets of six to eight leaders met between workshops in order to support each other in addressing their LQs. The steering group met quarterly to approve the scope of the LQs being tackled and ensure they were related to the strategy of the business. The Leadership Question papers were assessed at postgraduate level and credit was gradually accumulated towards a master's degree as real business problems were being resolved.

The success of this programme led to a similar programme being introduced to another major bank which ran for four years with over 200 LQs being tackled over this time period. A memorable moment was when the steering group was being appraised of how the Leadership Question addressed by one of the participants had led to over £1 million of cost savings. The Managing Director commented 'Yes but it is not all about the money is it? What was the learning?' Sadly amidst the corporate reorganisation just ahead of the global financial crisis, the Managing Director was displaced and support for what was seen as a 'not invented by the centre' programme was lost. Many successful projects had been completed through the LQ process and it was recognised that a major, yet unfulfilled, opportunity was to create some form of knowledge management system to ensure organisational level learning.

On reflection, the real winners from this programme were the individuals who completed their master's degree in leadership by addressing real work problems through an action learning programme. Notably one member of that programme who really embraced the action learning ethos was to take his experience to another organisation in Australia and has now integrated action learning into his approach to strategic leadership in a highly commercial environment. Had the leaders of the reorganised regime looked back at some of the 200 Leadership Question reports they might well have seen some

indicators of the problems that lay ahead for their organisation and sector. The baby had been thrown out with the bathwater.

A leadership pedagogy in the education sector

In 2011, I was invited by the managing director of a private sector education organisation, to provide action learning-based support for their leadership development strategy. This organisation works across a multi-site structure with several thousand employees having grown, despite the global recession, through successful operational delivery and being able to pursue a strategy of further growth through acquisition.

From the start I realised here was an opportunity to help in the development of a learning organisation with a phased approach to the introduction of the ALQ method. I was later to read the following notes made by Reg Revans about his excitement when he was asked to introduce action learning to General Electric Company (GEC):

It was when one of the most successful industrialists in Britain, Sir Arnold Weinstock, offered his corporation, The General Electric Company (GEC) as a candidate for self-diagnosis and autotherapy that we were, for the first time in many years, entering the arena by the front door. In all our previous studies, the principal task had been to convince those in charge that their own staff, given the encouragement to support each other, were capable of identifying, defining and treating not only the familiar host of problems long demanding for attention, but the armies of troubles that lay concealed beneath the boardroom horizons. (Revans, RW2/8/13)

Initially, work had been conducted with the senior team to help formulate a new philosophy, focused on leadership and learning. It seemed obvious that if promoting a learner centric and empowering approach for its students then the same approach should be applied to personal and leadership development of its employees.

So I entered the arena by the front door. Nine executive level leaders from a range of professional functions opted to complete the Action Learning Facilitator Accreditation (ALFA) programme in order to develop their own capability in establishing action learning projects at all levels. In order to gain personal experience of the ALQ process these senior executives attended a workshop to develop a common understanding of action learning principles of the model of Action Learning Facilitation based on the concept of three 'modes' shown below. This model of Action Learning Facilitation was developed based upon the original thinking of Revans as subsequently articulated by Pedler and Abbott (2008). Key here was the recognition of the importance of the Mobiliser mode in order to ensure that political and organisational support is garnered for action learning. The Learning Set Adviser mode is the most obvious and visible aspect of action learning facilitation, however

creating the capability for set advising, through skills development alone, without effective mobilisation will consign action learning to the sidelines. Also a notable difference here compared to my experience in the financial services sector was that the executive level leaders were willing to tackle their own ALFQs, some examples of which are shown below. Whilst this might have led to a sense of vulnerability, particularly given the fact ALQ papers are assessed against postgraduate level descriptors for work-based learning, this did put the senior team in a much stronger position when it came to their role in cascading the ALFA programme down through the organisation. They were able to support others who may have felt the same initial trepidation about initiating action learning sets or in writing up their reflective accounts of action learning. They knew what a ‘good question’ looked like and were able to support others in navigating the political organisational landscape. In contrast, I recalled challenging the executive level steering group for one of the banking client programmes to take some of their own medicine and have a go at tackling a Leadership Question but that idea fell on deaf ears.

An executive level steering group was formed, chaired by the managing director, and the senior team were allocated responsibility for sponsoring and signing off the terms of reference for ALFQs being tackled by leaders at the next level down through the organisation. Two overarching organisational challenges were defined by the executive relating to the need as an organisation to learn faster and to be driven by customer demands. In this way, a direct link was made between business strategy, leadership development opportunities and action learning.

Three modes of action learning facilitation

Mobiliser



- Generates commitment for the action learning process from within or outside the organisation.
- Influences key sponsors and supporters to back the action learning initiative.
- Enables others to see how action learning relates to organisational strategies and systems.
- Manages political and organisational barriers in order to pave the way for success.

Learning set adviser



- Supports learning set members in their meetings, particularly in the early stages.
- Raises set members' awareness of their group and learning processes.
- Role-models action learning behaviours such as insightful questioning, agreeing actions and reflection.
- Helps the learning set work independently of the set adviser.

Learning catalyst



- Builds the capacity of the organisation to learn from its experience and to improve performance.
- Helps ensure individual learning generates organisational learning.
- Links learning to organisational strategies.
- Supports the expansion of learning across the organisation and over time.

The benefits of the approach have been appreciated by leaders at different levels:

The action learning approach enables us to work in an empowering and collaborative way, working cross-functionally and maximising the wealth of experience and knowledge in our organisation.

The ALF accreditation programme has enabled us to build a team of skilled facilitators acting as advocates and enablers of this action learning approach – the senior team are role-modelling the change we want to see.

Personally, I wanted to build my knowledge and skills as an ALF. I was keen to be part of the senior team who play a crucial role in 'marketing' the approach to the business. I believe that, in today's environment, an action learning approach has a key role to play in engaging the workforce and creating ownership for learning.

Examples of ALFQs

An ALQ needs to be focused on the problem holder who is tackling it, so it is usually framed by starting with the phrase 'How can I ...' Additionally the

word ‘can’ implies some form of future action on the part of the action learner. Below are examples of specific ALFQs drawn from the education provider. The overall title of the ALFQ below is expanded upon with a Terms of Reference process and document which also identifies key stakeholders who input to and sign off on initial plans for research.

Examples of ALFQs:

- How can I promote effective use of the online portal to support virtual action learning?
- How can I use action learning to embed a culture in which keeping students safe is everyone’s responsibility?
- How can I use the feedback and data we receive from our customers and employees to have an impact on organisational design?
- How can I use action learning to engage staff and customers in supporting quality improvement?

Business-driven action learning for leadership development

So some 12 years after developing the accredited ALQ approach I do believe it continues to evolve and has a key role to play in supporting leadership development in a climate where we face rapid change, increasing unknowns and ethical challenges. With ‘business-driven’ action learning as proposed by Boshyk (2000) there is no hiding place behind case studies or leadership theories. I would agree with the proposition of Kozubska and Mackenzie (2012) that there is a need for balance in addressing both the P and Q aspects of the $L = P + Q$ proposition of classic Action Learning as espoused by Revans. Also that we should not forget the significance of the ‘R’ for Reflection that IMCA have appended to the Revans $L = P + Q$ formula. In the case of accredited ALQs method ‘R’ takes place during the process of tackling an ALQ over typically a 90-day period. This is then reinforced by a structured process of reflection on action through the writing and/or presentation of the ALQ paper. In corporate cultures that are driven by the engine of systems this system of action learning has the potential to contribute to the development of a learning organisation.

Where action learning is simply tacked onto a leadership development programme with the intention of developing personal competencies, there is a risk that learning sets operate in a way which is disconnected with the business strategy. It becomes seen as simply a personal development exercise with the risk of the learning set becoming little more than a self-help group. I recognise though that in organisations where the aim is to provide reassurance and certainty to its staff members and clients or customers, then establishing action learning in order to tackle the unknown can be problematic. Training of known programmed knowledge (P) feels safer.

When presenting the collaborative Knowledge Mapping approach to a mixed group of action learning advocates recently I was challenged by one member of the group who felt that providing ideas regarding the body of knowledge relating to a problem holder's ALQ was not really in the spirit of action learning. The assumption was that this was being too directive. However, I would argue Revans has always recognised the place of 'P' in action learning, stressed the importance of conducting comparative research when investigating a problem, and has encouraged supportive collaboration with others. Of course, the final decision, indeed responsibility as to how to conduct relevant research lies with the problem holder.

Action Learning is situated in the reality of the organisation, with its wicked problems, organisational politics, power dynamics and ambiguities (Pedler 2012; Vince 2001). Rather than being seen as obstacles to the creation of some ideal of the perfect organisation, these challenges should be embraced and harnessed to provide impetus for positive organisational change. And a catalyst for such change may be those with changing job titles.

Notes on contributor

Richard Hale, Dr, leads the ALQ-based qualification programmes provided by International Management Centres Association, the action learning business school. His early career was in management and leadership development with GEC and British Sky Broadcasting in the UK. In an advisory capacity, he has worked with corporate and public service organisations internationally, including the provision of support to the government reform agenda in several African countries. He founded and facilitates the group 'Action Learning Forum' on Linked In as well as the postgraduate level Action Learning Facilitator Accreditation programme (www.actionlearningfacilitator.com).

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