



Suffolk ABCD Network

Action Learning Guide



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What is Action Learning?

Action Learning builds on the relationships between reflection and action. Learning by experience involves reflection, ie reconsidering past events making sense of our actions, and possibly finding new ways of behaving at future events.

(Mcgill & Brockbank : The Action Learning Handbook, 2004)

Action Learning takes place in small groups (known as a set), where members help each explore a particular situation, challenge, or idea, through questioning and reflection, with a view to finding a solution or next steps.

Talking through ideas and challenges with other people is reflective. Having formal sets allows you to have defined time and space for conversations and reflections to take place.

A set will meet over a period of time, which can vary depending on the needs of the set. The frequency of meetings is decided by set members.

How Action Learning Works



Facilitator



The role of the facilitator is to guide the set during the first few meetings, ensuring a code of conduct is agreed, that the action learning principles and processes are followed, and that the set keeps to time. They may also make notes of actions that the presenter plans to take.

They may also help develop questioning, listening and reflection skills. A facilitator's focus is in supporting the set rather than actively helping a presenter work on their challenge.

A set may be self-facilitating. This is where there is not a facilitator and the set members share responsibility for facilitation and the action learning process.

[\(see Appendix 5\)](#)

Presenter



This is the person presenting their issue, challenge or idea to the rest of the set.

They will present this to the rest of the set and explain what outcome they would like from the session.

The presenter will think about the questions that set members ask them, develop various options and decide upon their next steps.

At the following set meeting, the presenter updates the set on their progress so far.

Set members



These are the other people in the set who are not either facilitating or presenting.

Their role is to 'coach' the presenter. They listen carefully to the presenter, ensure they understand their challenge issue or idea and then ask open questions to help the presenter to work through this and develop specific actions that they can take.

The First Meeting

The first set meeting may be structured like this. A more detailed suggested meeting structure can be found in [Appendix 6](#).



At the start of the first meeting the set need to agree how the time will be spent, and as a self-facilitating set will need to decide upon a note taker and time keeper for the meeting. This could be the same person or two separate people.

You need to allow time for:

Introductions

The first set meeting may be the first time you have met the other members in your action learning set so at the first meeting you may wish to take time for each member to introduce themselves and their background or experience to the rest of the set.

Decision making

The set will also need to agree the following during the first meeting:

- Meeting frequency and the dates for future meetings
- How many meetings the set will have (this can be revisited and changed at a later date)
- A code of conduct for the set ([see Appendix 7](#))
- When members plan to review the set to ensure that it is meeting the member needs.

Presentations

This is where the usual action learning process will take place. You may not have as much time for this during the first meeting and may decide to have fewer presenters in the initial meeting.

There is space in [appendix 8](#) to record the decisions made by your set at your first meeting.

A Typical meeting

Further set meetings will follow the meeting structure below. A more in-depth explanation can be found in [appendix 9](#).



Reviewing a set

Set Process Review

It is helpful to review the set early on and again after several meetings to ensure that it is meeting the needs of the set members. This might include a review of the code of conduct or the meeting times/dates agreed in the first meeting for example. ([See Appendix 10](#))

Leaving a set

One of the key principles in Action Learning is that participation is voluntary. You should not feel obliged to continue with your set meetings if it is not meeting your needs.

It would help us to understand your reasons for leaving your set so that we can ensure that we are meeting the needs of network members.

We therefore ask that you complete this short feedback form about why you have chosen to leave your set:

<https://forms.office.com/r/qEg9AdyeRj>

Ending a set

A set may choose to end after a prescribed number of meetings, because they feel that the set had naturally come to an end or because members feel they have achieved their objectives.

The process of ending the set should be planned. The meeting will take a different format to usual set meetings and should involve a task to help set members disengage with the set.

It is a time to assess each member's achievements and give each member time to articulate their achievements and recognise growth. This is done through completing an end of set review [\(see appendix 11\)](#).

Ending activities are also included in this meeting as it is recognized that these can help to give a sense of closure on the set.

We also ask each set member to complete an evaluation form here: <https://forms.office.com/r/DG7NLaRQNO>

It is important that the evaluation is only completed once the final set meeting has taken place and any feelings associated with the set have been expressed.

A suggested structure for the final set meeting, and suggested ending activities, can be found in [appendix 12 and 13](#).

Further Reading

Below is a list of resources which have been drawn on to put this guide together. They may be helpful if you wish to learn more about Action Learning.

Books

The Action Learning Handbook: McGill and Brockbank, 2004

Online Resources

'A guide to an Action Learning Sets' by ALS Facilitator Val Theadom: <https://www.thersa.org/globalassets/action-learning-sets-guide-june-2018-by-val-theadom.pdf>

What is Action Learning? M.Pedler 2005: <https://studylib.net/doc/7602370/what-is-action-learning%3F>

Action Learning and Group coaching: <https://www.personal-coaching-information.com/action-learning-and-group-coaching.html#whatis>

Websites

www.actionlearningassociates.co.uk

<https://www.managementcentre.co.uk/blog/action-learning-sets-group-problem-solving/>

Appendix 1: Action Learning Problem Brief

(From Action Learning Overview: M.Pedler, 2005)

You may find it helpful to plan what you would like to present about your problem, challenge or idea at the first meeting. Not every member is expected to present at every meeting but you should be prepared to participate and support those who are presenting. Use the form below to help you with your planning.

Describe your problem, challenge or idea in one sentence.

Why is this important:

- To you?

- To your organisation?

How will you recognise progress on your problem, challenge or idea?

Who else would like to see progress on this problem, challenge or idea?

How do you intend to go about tackling this problem, challenge or idea?

What are your first steps?

What difficulties do you anticipate?

What are the benefits if this problem, challenge or idea is resolved:

- To you?

- To your organisation?



Appendix 2: Questioning

It is important during the question phase that the focus is on the presenter and not drawn away from them through the use of 'I' statements or through rhetorical/leading questions such 'Have you thought about....' Or why don't you try...'

The use of open questions allows the presenter to develop their own ideas and plan. Think about questions that start with what, how, why, who, where, when.

Questions should also be phrased to be encouraging rather than perceived as an attack. For example, rather than asking 'Why do you want the job?' it could instead be phrased as 'What is it about the job that attracts you?'

It is usually the role of the facilitator to ensure that questioning remains focused and appropriate. In a self-facilitated set it is important that set members regulate this themselves and should not be afraid to intervene if questioning becomes leading or the focus moves away from the presenter, for example.

Some example of questions can be found below, which is taken from 'A guide to an Action Learning Sets' by ALS Facilitator Val Theadom

What result do you want?	What is your biggest difficulty or problem?	How do you feel about this situation?
What could you do differently?	Why can't you do it?	What judgements are you making about this situation/other person?
What learning are you taking from this session?	What are you trying to achieve?	What can you do about it?
What should make the situation better?	How does the situation affect you?	What's the worst thing that might happen?
What's the most extreme measure you could take?	What's the best possible outcome?	When will you start?
What options are open to you now?	What could you start to do differently?	What action are you going to take?
Who could help you?	How important is this to you?	

Appendix 3: Action Points

(Taken from 'The Action Learning Handbook: McGill & Brockbank, 2004)

The tangible outcome of a set meeting is the intention to act by set members. Action points emerge from each presenter's time, decided by the presenter themselves, after each set dialogue. Action points should be SMART (specific, measurable, achievable, realistic and time bound).

Good Action Points	Not so good Action Points
I will meet with my manager on Tuesday to discuss my salary	I will talk to my manager soon about things
I will require reports from all my staff by the end of the week	I will start asking my staff to do reports
I will meet with my direct reports once a month	I can see my direct reports any time
I will ask for a 50% increase	I can insist on a rise of x%
I will arrange to meet at 2pm on Tuesday	I will arrange to meet soon.



Appendix 4: Reflection and Set Meeting Review

(From Action Learning Overview: M.Pedler, 2005)

After each set meeting it can be helpful to record any decisions that you came to about your problem, challenge or idea, and any steps you plan to take. It is also helpful to reflect on what you have gained from the set meeting.

The three things I've learned about my problem, challenge or idea today are:

-
-
-

The most important thing I've learned about myself today is:

My action plan before the next meeting is:

The one thing that stands out for me today in terms of our set is:

Is there anything in the process that could be improved to make the set and/or meetings more effective?

Appendix 5: Self Facilitating Sets

(adapted from 'The Action Learning Handbook', McGill & Brockbank)

Some sets have a person whose specific role in the set is to be the facilitator. Other sets are classed as self-facilitating, where the tasks usually undertaken by a facilitator are carried out by set members instead..

At the first meeting the set will agree their basic procedures and code of conduct. These may be adapted at later meetings depending on the needs of the set.

Life expectancy

The set agrees the period of time over which it will meet. This could six months or perhaps nine for example. After the final review meeting the set may decide to continue or end.

Meeting Frequency

This will depend on the need of the set members. Meeting approximately every 4-5 weeks will enable the set to keep things moving and complete any action points between meetings.

Meeting duration and set numbers

A set usually has around 4-6 members. The amount of members per set will impact on the meeting duration: more members will mean a longer meeting. A set of around 3-4 people may complete their meeting in around 2 hours but a set of about 6 members may take much longer.

Use of meeting time

The set will decide how to allocate time to different parts of the meeting, such as initial greetings, setting dates for next meetings, time for each presenter.

Time keeping and note taking

This is essential to keep the group focused and to avoid presenters running over their allotted time to the detriment of other presenters. Notes should also be taken of each set member's actions / next steps so that these can be circulated to set members.

Review of the set

Near the end of the meeting the set may choose to review the effectiveness of the meeting for each member.

'End of set' review meeting

The set may decide to end after a certain number of meetings or if members feel that the set has run its course. The final review is an important part of the learning process.

Appendix 6: Suggested plan for first meeting

(adapted from *The Action Learning Handbook: McGill ad Brockbank, 2004*)

The first set meeting will take a different format to the usual set meetings, as members will need to get to know each other and make some basic but important decisions about how the set will operate.

Below is a suggested plan for your first meeting. The set will need to agree timings of each part of the meeting at the start.

It may be helpful to complete the presentation brief before the meeting if you would like to present a problem, challenge or idea to the set.

<p>Introductions</p>	<p>Members to introduce themselves to the set by considering the following questions:</p> <ul style="list-style-type: none"> • Who am I and what I do • Something that I would like to leave in an imaginary suitcase outside of the room so that I can fully focus on the set meeting (e.g I have left a pile of work on my desk that I know I should really be doing) • What I would like to bring to the set so the set can work well (e.g I am new to ABCD but I have a willingness to learn more) • (optional) something unusual about myself that no-one else in the room knows (and that I am happy to share) <p>Decide who will keep time and take notes for the meeting.</p>
<p>Decision making</p>	<p>Members to discuss and agree their code of conduct. This should be recorded in the meeting notes.</p> <p>The set should also decide on the dates and times of the next few meetings so that these can be diarised and be made a priority. They should also decide on meeting length.</p> <p>Meetings should usually be around 4-6 weeks apart to allow for actions to take place.</p>
<p>'Getting to know each other' activities</p>	<p>Some suggested activities for this section – you do not need to do all of these activities.</p> <p><u>Self portrait</u></p> <p>Write you name in the middle of your page and then create 10 points for your portrait (only share what you are happy to share)</p> <ul style="list-style-type: none"> • A significant date • A place of importance • A learning experience – an event that had a crucial and significant effect on how you see/saw the world • A hero/heroine alive or dead – a source of inspiration • 2 significant people – to whom you are now close, who are important to you • An example of an unresolved conflict • A present job concern or focus – a specific part of your work which is a source of opportunity, difficulty or interest. • Symbol/picture – a visual representation of yourself • Bits of personal history – up to 6 things that represent your life • An example of good support network – a place where you felt supported and understood <p>Each person in the set then takes 10 minutes to present their portrait to the rest of the set. At the end of each presentation time is given for set members to ask questions that clarify the picture</p>

	<p>further. When everyone has told their story set members may feedback what they have gained or learnt from the experience.</p> <p><u>Lifeline</u> Each participant has a piece of paper. They should draw their story, their lifeline, in pictures, however they want. They then explain to the set what the images mean.</p> <p><u>Life Shield</u> Divide your page into quarters and draw images in each quarter relating to the following headings:</p> <table border="1" data-bbox="363 470 933 541"> <tr> <td>My life at work</td> <td>My life at home</td> </tr> <tr> <td>My life with friends</td> <td>My hopes and dreams</td> </tr> </table> <p>Each member then presents their shield to the set and explain the images/statement</p>	My life at work	My life at home	My life with friends	My hopes and dreams
My life at work	My life at home				
My life with friends	My hopes and dreams				
Bidding round	<p>Members may be keen to start on the action learning process so the set should enquire whether anyone would like to present during this meeting. Members may wish to use the Action Learning Problem Brief form beforehand to help prepare to present during the meeting.</p> <p>Start by asking if any member would like to volunteer to present. Of those who volunteer, ask them to give a headline of their issue if they were to present.</p> <p>The set should decide how many presenters they can fit into the remaining meeting time, usually allowing 30 mins per presenter to complete the cycle, and the order in which presenters will take their turn.</p>				
Presenting	<p>Each presenter takes their turn to present/tell their story however they wish.</p> <p>This is followed by clarifying and open questioning.</p> <p>The presenter then decides upon their actions / next steps and shares these with the set.</p> <p>Optional: Resource sharing – each set member offers the presenter a resources such as a contact, a website, a positive affirmation.</p> <p>This process is repeated for each presenter.</p>				
Reflection	<p>The first meeting ends with a reflection on the meeting.</p> <p>This could take the form of:</p> <ul style="list-style-type: none"> • Share one thing about the meeting which you felt went well and one thing which could have been done better • How do you feel about how the set is working? 				
Check out	<p>Because it is voluntary to participate in action learning, the set should check whether all participants intend to continue with the set meetings or if anyone wishes to withdraw.</p> <p>Confirm date and time of next meeting.</p>				

After the meeting it may be helpful to complete the Presentation Review form in order to reflect on the meeting and to record your chosen actions.

Appendix 7: Code of Conduct

(adapted from 'The Action Learning Handbook', McGill & Brockbank)

During the first meeting set members should create a code of conduct which will shape the way in which members work during the meetings. The code of conduct may be revisited or amended at any time to ensure that it is still effective and meet the needs of the set.

You may wish to consider these points when creating your code of conduct.

Confidentiality

This is essential to developing trust within the set.

It is important to understand the difference between content and process. **Content** is the material, issues and ideas that members bring to the meeting, whilst **process** is how the set works.

Whilst it members may consider it acceptable to discuss set processes outside of meetings, set member content should remain confidential.

Responsibility

Members are responsible for their own learning, feelings and actions.

The facilitator is mainly responsible for the day to day running of the set and the following of processes during meetings. However, where a set is self-facilitating then this responsibility is shared between members.

Being non-judgemental

Set members accept the presenter's narrative. They avoid verbal and non-verbal approval or disapproval.

Discriminatory remarks

Members have the right to challenge remarks made by others, which they feel are discriminatory.

Making 'I' Statements

This is where members phrase their narrative in terms of 'I'.

This makes it clear that the speaker is the person experiencing the behaviour, and gives them ownership.

One at a time

One conversation at a time.

One presenter at a time.

This means that members can give their attention solely to the presenter.

Members should not give their own anecdotes as this draws attention away from the presenter.

Time keeping

Timings of set meetings are determined by members. The facilitator oversees this during meetings. Where the set is self-facilitating then this responsibility is shared between members.

Commitment

Set members commit to attending all meetings and making them a priority.

Dates and times of meetings are commonly agreed during the first set meeting.

Constructive Feedback

Feedback needs to be specific, relevant and balanced.

Ensure that the presenter can accept it, understand it and use it.

In a safe environ

In a safe environment people may admit weakness, disclose inexperience and ask for help.

Silence

Silence is important to allow presenters time to reflect upon questions and develop responses.

Rapidly asking the presenter questions may feel more like an interrogation and not give them time to reflect and formulate responses.

Silence may occur due to a presenter taking their time because they are stuck, or they are on the verge of recognizing something about themselves or their situation.

Interrupting the silence with a question at this point may distract them from their thought process.

Naïve questions are valid

Set members will have a variety of backgrounds and experience and may be unfamiliar with those of other set members.

Therefore, some questions asked may be naïve but can be positive in that they can help set members review assumptions they may hold about their work/life.

Appendix 8: Record of your set's decisions

Use the space below to record the decisions made in your first set meeting.

Life Expectancy of set
– how many meetings
do you plan to have?

Date set of review

Dates and times of set meetings

Code of conduct - Record your set's code of conduct here.

Appendix 9: A typical meeting structure

Check-in	<p>Each set member in turn, says something about what has happened to her or him since the last meeting and also mention briefly any issues they might want to talk about.</p> <p>This allows for agenda items to be listed and also for people to share the “headlines” of their experiences since last time.</p>
Bidding Round	<p>Each set member asks for the time he or she wants for discussing issues. When all the bids for time have been made, the order for the day is established. Timings for each section of the meeting should be agreed so that the process keeps moving and the set does not run out of meeting time.</p> <p>Not every set member needs to present in every meeting. Depending on your meeting length, the set will need to decide how many people can present in the meeting and how much time can be allocated to each presenter.</p> <p>The set will also need to decide on who will keep time and take notes in a self-facilitating set.</p>
Individual Time Slots	<p>This is the body of the set meeting, when individuals take a period of time to talk through:</p> <ul style="list-style-type: none"> • what he or she has done, or learnt, • plans for future activity, • responses to events since the last meeting. <p>The presenter describes their issues as clearly and concisely as possible and what outcomes they would like.</p> <p>The set members ask clarifying questions to understand more about the issue. They then ask open questions to ‘coach’ the presenter and provoke deeper thinking about their issue.</p> <p>The presenter then takes time to summarise their progress on the issue and any next steps they plan to take.</p> <p>OPTIONAL: The set may have a resource round at this point where each set member offers a resources to the presenter. This could be a contact, a website, reflections or thoughts based on their observation of the issue and their own experience. The presenter listens at this point without commenting on the resources offered. After this round the presenter may then choose to reconfirm their actions.</p>
Set Meeting review	<p>A short review of the meeting should take place at this stage. Members may start by sharing their initial feelings about the process. This stage should focus on the process of action learning rather than the presenter’s content. It may help to use the questions in the Set meeting review proforma.</p>
Review of Set Process	<p>This stage only appears when somebody feels the need for it. Early on in the set’s life, it can be useful to put some time aside to talk through people’s perceptions of how they are operating together as a set. This process is to review how the set is operating and any changes which may be needed, rather than to review the content of the presenter’s subject.</p>
Check-out	<p>At the end of the meeting, each person briefly sums up their next steps and actions they will take before the next meeting. This should be recorded in the meeting notes.</p> <p>A suitable ending to a set meeting may then be for each member to consider the following questions:</p> <ul style="list-style-type: none"> • What did I want? • What did I get? • How do I feel?



Appendix 10: Set Process Review

(Taken from the Action Learning Handbook, McGill & Brockbank, 2004)

It is helpful to review the set early on and again after several meetings to ensure that it is meeting the needs of the set members. This might include a review of the code of conduct or the meeting times/dates agreed in the first meeting for example.

What am I gaining or learning from the set, or doing differently as a result of the set, for myself, for my personal work and my relationships with colleagues?

What am gaining or learning in terms of my understanding of the process of the set that I have applied in my work?

What are we gaining as a group?

How can I/we improve the operation of the set to make it more effective?

How do I wish to utilise the set for the remainder of the cycle?

Any other issues I may wish to raise?



Appendix 11: End of Set Review

(Taken from the Action Learning Handbook, McGill & Brockbank, 2004)

What did I gain or learn from the set, or do differently as a result of the set, for myself, for my personal work and my relationships with colleagues?

What did I gain or learn in terms of my understanding of the process of the set that I have applied in my work?

What did we gain as a group?

How could I/we have improved the operation of the set to make it more effective?

Any other issues I may wish to raise?

Appendix 12: Suggested structure for the last meeting

Check in	Each member feeds back on any actions take since the last meeting
End of Set Review	Each set member completes an end of set review in preparation for the session. This can then be discussed as a set. This ensures that members have the opportunity to engage in reflection. The review should be completed before any ending activities so that any issues are resolved before the set ends.
Set ending activity	The purpose of completing an activity together is so that set members experience 'closure' on the set. Some activities for this part of the meeting are suggested below.
Checkout	Set members are reminded to complete the online set evaluation form.

Appendix 13: Suggested activities for your final meeting

The ending game (Ross, 1991 - adapted for virtual meetings)

Before the meeting: each set member prepares what they, as an individual, have not said, or would want to say again to each of the other set meetings as a goodbye. They should also consider what feelings arise for them when they think about leaving the set.

During the meeting: Each member presents to the group their feelings around leaving the set. In turn, each set member what they would like to say to that set member. The process is repeated for each set member.

Present giving

This is where set members offer positive opinions to each to each other. If meeting in person then this could be done by each member writing this on a post it note which is then placed in a pile for the member to take away with them to read after the meeting. In a virtual meeting this may be more difficult but could be done by each member vocalizing their opinion to each of the other set members.

The Long Goodbye

One person starts by choosing another member to say goodbye to, by saying 'Goodbye ... I will miss.....'. This person then chooses a different person in the set to say the same statement to. This continues until everyone in the set as said goodbye to another member.

It is important that the statement is specific and not a general comment e.g Goodbye Him, I will miss your probing questions.