



Action Learning in HEALTHCARE

A PRACTICAL HANDBOOK

John Edmonstone

Foreword by Hazel Mackenzie

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A practical handbook



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Foreword

John Edmonstone's book is timely. We are living in uncertain times with a great deal of complexity and no easy answers. The tendency towards instant decision-making is swept along by an ever-growing tide of demands on our time. This is the daily reality for many of us both in the workplace and at home. The negative consequences of this 'rush to judgement', as John describes it, are apparent in our histories as individuals, teams, families, organisations and societies.

In this book, John presents action learning not as a simplistic answer but as a means of personal and organisation development which steers a path between action and reflection, and enables the creation of a development culture in our organisations. Action learning moves beyond traditional models of learning, which focus on knowledge and skills, to address the potential gap in terms of transferring that learning into practice.

John sets out the goals of action learning as to:

- Benefit organisations by addressing perplexing issues that have previously seemed insoluble
- Help organisations to use the potential of their staff better
- Help individuals to learn with and from others by discussing the difficulties each member of an action learning set experiences while working on an important organisational issue
- Benefit individuals by learning how to survive and operate successfully in a complex and confusing world.

These goals, in themselves, are a testament to the relevance of this book to our current context.

The book is essentially divided into three sections. The first addresses the principles of action learning. It draws on a broad theoretical base including adult learning, organisational development, learning styles, traditional learning and action learning in a way that is simple and accessible, without being simplistic.

The second and largest section of the book concentrates on the practice of action learning. It deals comprehensively with issues including preparing the ground and engaging stakeholders; the scope of action learning; identi-

fyng problems, projects and issues; forming and running sets including key skills from the perspectives of set members and facilitator; troubleshooting; managing the process and evaluating action learning. This section of the book is replete with practical guidance and checklists that can be used directly, or adapted. The inclusion of some very helpful chapters on the evolution of action learning and variations on an action learning theme ensures that the content never becomes formulaic but remains thought provoking and invitational.

The final section of the book, combined with the bibliography and web sites, offers a wealth of resources to support action learning and the development of action learning approaches and their applications.

The scope of John's book means that it will have relevance to a broad range of readers including educationalists, managers, those commissioning action learning, OD practitioners, action learning facilitators and set members.

I have known John Edmonstone for close to 20 years. There are few practitioners who can move so deftly between theory and practice in a truly authentic way which resonates and 'makes it real' for those who are fortunate enough to work with him as a commissioner, colleague or as a participant. It is, therefore, no surprise to me that he has created a book which is not a theoretical tome, although it includes plenty of theory, but is truly a user's manual. The book reflects what I have understood as John's compelling drive – to make a difference, not only for the individuals who make up our organisations but also for those who are on the receiving end of our services.

In conclusion and in John's words – 'if what we know about the future is that we do not know much about it, then the key responsibility is not to give people tools that may be out-of-date before they have even been fully mastered, but to help them become more confident and competent designers and makers of their own learning tools as they go along.'

I cannot think of a more pertinent approach to the times in which we work and live.

Hazel Mackenzie
Head of the National Leadership Unit
NHS Scotland
July 2011

Who should read this book?

Potentially, this book has a wide audience. It will be of use to senior managers and professionals considering using action learning for leadership, management and organisation development purposes. It will be of relevance to organisation development (OD) practitioners – those people who have a responsibility for project-managing the use of action learning in local programmes. There is much in the book for the facilitators of action learning sets to take, modify and use in their own practice. Finally, set members themselves will discover material which should enhance their contribution to, and ensure pay-off from, action learning sets.

About the author

John Edmonstone is a leadership, management and organisation development consultant who works in the public sector in the UK. He has held a wide range of line, project and human resource management positions and runs a successful consultancy business based in Ripon, North Yorkshire.

He is Senior Fellow at the School of Public Policy & Professional Practice, University of Keele, Fellow at the Institute for International Health & Development, Queen Margaret University, Edinburgh, Associate at the Centre for Innovation in Health Management, University of Leeds, and Associate at the Edinburgh Institute of Leadership and Management Practice, Edinburgh Napier University.

He has worked regularly with action learning as an internal and external consultant and facilitator since meeting Reg Revans in the 1970s.

Acknowledgements

Thanks are due to all the set members I have worked with over the years in so many healthcare organisations. The insights I have gained from working with you have been immense. Also to all my fellow facilitators, from whom I have learned so much.

Finally, my thanks (as always) to Carol my own personal 'comrade in adversity'.

To

Finlay, Alexander and Madeleine. I know you'll get all the support and challenge you will ever need. May you always stay 'forever young'.

Introduction

I first met Reg Revans, the originator of action learning, at what we would now call a learning disability hospital in the mid-1970s. Although he could sometimes come across as the original ‘grumpy old man’, the clarity and power of his thought and his dedication to action learning as a means of personal and organisational development was abundantly clear. Later, in the 1980s, I recall attending a meeting at the Department of Health in London where Reg tried (and failed) to convince the civil servants running what is now called the Human Resource function that action learning was a method which could help them achieve what they needed – a developmental culture or learning organisation within the National Health Service in England.

Subsequent history has involved the use of action learning initially in the development of managers – and then from this base, a spread into other areas – into managerial leadership development; into professional (often clinical) leadership; into professional practice development, and with application to all sorts of professional and occupational groups, including information technology professionals, risk managers, service-improvement facilitators and so on. Action learning can be argued to have at least some of its’ roots in healthcare, based on Revans’ pioneering work at Manchester Royal Infirmary in the 1960s¹ and there has subsequently been something of symbiotic relationship between action learning and the UK National Health Service.²

History has ultimately proved Reg Revans so right in so many ways. His resignation from Manchester University in protest at the creation of a Business School on the American model may have seemed ‘fogey-ish’ at the time (the 1960s), but the insights which he developed then, and afterwards, have recently received a powerful endorsement from no less a figure than Henry Mintzberg.³

Of course, action learning can seem deceptively simple and there is a danger of thinking it is only ‘learning-by-doing’ and that, by extension, anyone can do it, either as a set member or, more particularly, as a facilitator. Revans did not recognise the need for such facilitators, but experience has shown that they are generally now accepted as an integral element of action learning.⁴ However, action learning often seems to have developed something of a mixed press in

the UK. Among the common instances I have seen when action learning 'goes wrong' are, on the one hand, insufficient challenge offered to set members (and the consequent degeneration of the set into a cosy discussion group); and on the other, fairly prescriptive interpretations and interventions by facilitators (often of a psychodynamic nature). Steering a path between support and challenge as well as between action and reflection remain at the heart of successful sets.

This book is dedicated to the notion that action learning is not that simple and that there has grown up a wealth of experience in its application, so there really should be no need for constantly re-inventing the wheel and repeating the errors of yesteryear. There is, of course, a paradox here. Capturing and sharing such experience helps turn what action learning calls questioning insight (Q) into programmed or codified knowledge (P). Q keeps on developing further insight; therefore, this book can only really be one person's snapshot at one point in time.

The book is divided into three parts. Part 1 is an exploration of the ethos of action learning – the core ideas and underlying assumptions. Part 2 (which is essentially the 'guts' of the book) addresses such issues of practice – preparation, projects, sets, facilitation and evaluation. Part 3 is a compendium of some resources which may be used in association with action learning, together with useful websites and an extensive bibliography. Taken together, Parts 2 and 3 look at the techniques, methods, etc., associated with action learning.

Dotted throughout the book are a number of pertinent aphorisms. It was an approach adopted by Reg Revans himself, as a means of encapsulating complex notions in a simple but effective phrase.

John Edmonstone
July 2011

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Part 1: Principles



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