BRINGING ACTION REFLECTION LEARNING INTO ACTION LEARNING

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This paper introduces Action Reflection Learning (ARL) as a learning methodology that can contribute to, and enrich, the practice of action learning programs. It describes the Swedish constructivist origins of the model, its evolution and the coded responses that resulted from researching the practice. The paper presents the resulting sixteen ARL elements and the ten underlying principles.

What is Action Reflection Learning?

Action Reflection Learning emerged in Scandinavia in the late 70s as an alternative approach to developing leaders, one which focuses on using action projects and intense reflection. It was part of a movement that challenged the traditional teaching techniques that had been until then used for management education.

In those days, corporations were led by managers who had attended management training programs based on the traditional business schools' model. A group of professors teaching at the University of Lund, Sweden, gathered with some friends in management positions and some colleagues working as consultants and HR professionals in Swedish organisations. They shared their frustration with what they saw as ineffective managerial behaviour, and with the way the training programs offered by educational institutions addressed the professional development of executives. In the first place they focused on developing leadership instead of management competencies (Rohlin, 1996). Analyzing what was being taught to managers they realized it was not aimed at developing leadership. Leaders needed fewer facts and techniques, and more new behaviours.

But behaviours are the visible expressions of attitudes, beliefs and values. Some dilemmas surfaced: Are managers supposed to use authority or influence or advocacy? Expertise or consensus? They observed that developing new behaviours was closely connected with reviewing the values and assumptions underlying the current leadership practices as well as uncovering contradictions and paradoxes.

Once this was clear, the question became what development approach was best suited for the new challenge. If what mattered was learning how to behave differently, to be, to act and to think differently, then the classical teaching model did not best serve this purpose.

This avant-garde group developed their new way of training by asking a number of questions: How do we find a pragmatic solution? How do we, educators, change the way we think, review our assumptions and belief systems, uncover our values and address the paradoxes of our educator's role?

In 1977 about 100 professionals from business, consulting organisations, and universities worked in a participative way over 18 months to develop concepts on which the new approach would be based. They agreed on three key criteria: 1) develop leaders who thrive on change, and are comfortable living with ambiguity and uncertainty; 2) build trusting relationships; and, 3) develop learning based on action and reflection, using real-time interventions on current challenges. They called it the MiL Model, as the group became the MiL Institute.

The evolution of the model

The MiL model continued to evolve organically, shaped by clients' needs, restrictions and special requests, and driven by participants' contexts and expectations. The practitioners used their creativity and best professional judgment to stay loyal to the grounding principles of using real business challenges, and alternating action with reflection as a way to develop new mindsets, attitudes and behaviours appropriate for times of uncertainty. In an experiential and reflective learning mode applied to themselves, the MiL practitioners experimented with the number of sessions, the duration of the sessions, the type of projects selected, the role of the learning coach and the style of his/her interventions.

By the mid '80's, the approach was called Action Reflection Learning, so as to validate and stress the importance of individual and group reflection in heightening awareness and in developing new frameworks for learning. (Rohlin, 2002). In hindsight, it may have been motivated by the need to give a new name to a new practice that at that time no longer fitted the original action learning settings and specifications.

The ARL approach was used in a diversity of contexts: in academic settings, for open enrolment as well as in-company programs. The outcomes also covered a wide spectrum: to support a post-merger integration; to develop high performing teams; to create new business strategies; for coaching individuals; navigating organisational transitions, implementing mentoring programs, developing leaders and instilling specific competencies.

In this way ARL moved naturally from an approach centred on leadership development to a broader learning methodology applicable to a variety of interventions. Consistent with ARL's constructivist essence, the praxis just continued to evolve naturally, led by practitioners, not by theories or conceptual frameworks.

By the mid-1990s, the ARL practice expanded into Latin America. This situation created an interest from a number of new consultants in Colombia, Argentina, Brazil and Mexico, who wanted to understand "exactly" what ARL was – the characteristics, the key components, how it worked, and what a learning coach was expected to do. This need for being taught may relate to a cultural pattern that is more common in Latin America and rooted in a positivist approach to life, where individuals have high respect for 'gurus' and easily accept experts. This preference may also be partly a legacy of colonialism, but it was in contrast with the post-modern orientation of the original ARL practitioners.

The fact that the new Latin American practitioners were eager to "learn from experts" constituted a challenge, since the ARL approach was conceived as an organic process, one that was in opposition to theories and concepts that were "cast in bronze" and transmitted as universal truths. ARL was deeply rooted in an experiential learning model that explicitly invited individuals to create their own interpretations and versions of truth. To give an example, at the beginning of a program each participant would be given a hardcover book, titled 'Leadership'. But after opening it the participant would find that all the pages were blank. The message being sent was: "Whatever you will learn about leadership, will be your own creation. You will define what leadership is". If everything was organic in ARL and subject to the practitioner's creativity, some things were nevertheless consistent. One of them was the scant attention and importance that had been given to developing theories or models about the practice.

To respond to the questioning of the new Latin American practitioners, the more seasoned coaches began to identify some aspects of their practice that could be called "characteristics". The US-based consulting firm LIM (Leadership in International Management) collected these into a handbook for learning coaches, together with tools, processes and recommendations about the role of the learning coach, in an attempt to walk the fine line between remaining organic and sharing knowledge.

Principles, elements and tools

In 2004, I began a qualitative exploratory study to research the principles and elements common to the ARL practitioners. I studied the literature related to the practice of ARL and used a questionnaire plus selected semi-structured interviews with a cross cultural sample of 23 practitioners from Sweden, Denmark, Mexico, Colombia, Argentina, and the USA, who had had experience designing and/or implementing ARL based interventions.

As a result of this study, it was possible to identify sixteen elements common to the ARL practitioners. The elements can be grouped into WHAT the Learning Coach does, HOW it is done, WHEN it takes place – with a central element (Figure 1)
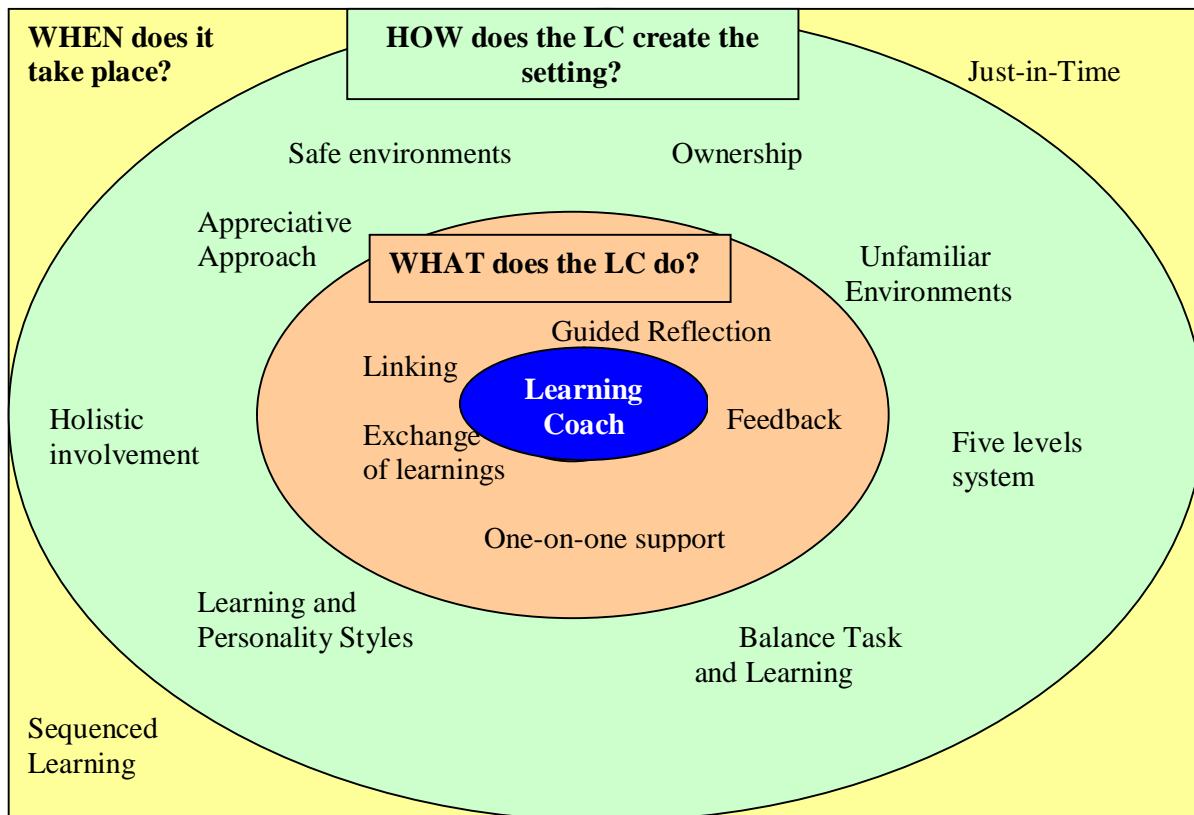

Fig 1: The sixteen ARL elements

The ARL Principles

Together with my Brazilian colleague Boris Drizin, we asked "What makes an element, e.g. Ownership, a key component of the ARL approach? What assumptions underlay it? These questions, asked one by one for each element, allowed us to develop a conceptual framework of ten

principles, anchored in a diversity of disciplines. The power of the ARL seemed rooted in behavioral psychology, in Gestalt Theory, in cybernetics, in systems thinking, in humanistic psychology, in philosophy, in appreciative inquiry, in several learning theories such as social learning, transformational learning, and experiential learning, in psychoanalytic theory, and in cognitive psychology, to name a few.

We analyzed and grouped the assumptions, searching for wording that would honour the assumptions held under that category, and at the same time would describe them succinctly. We came up with <u>ten principles</u> – *the theoretical foundation stones* - that supported the <u>sixteen elements</u> – *the strategies for implementation*. In addition to these theories and strategies for implementation illustrated in Table 1, we also defined some examples of tactical approaches to implementation, which we called tools.

Table 1. The Principles, Elements and Tools of Action Reflection Learning

PRINCIPLES	**ELEMENTS**	**TOOLS**
Theoretical foundation	Implementation strategies	Implementation tactics
Relevance *Learning is optimal when the focus of the learning is owned by, relevant to, important and timely for the individual.*	**Ownership:** **Taking ownership for one's learning**	Co design; Personal Learning Goals Expectations framed as questions
	JITL: Just in Time Learning (Just in Time intervention)	Various Concepts and Tools Learning coach (LC)
	Linking: Connecting the concept with other contexts, generalisation, application	Reflection question on how to transfer what was learned to other situations
	Balance Task/Learning	Project Real work/challenge Capturing lessons at individual and team level
Tacit Knowledge *Knowledge exists within individuals in implicit, often unaware forms, is under- or not fully utilized and can be accessed through guided introspection.*	**Guided Reflection**	Different tools (Reflection and Dialogue, Stop Reflect) Learning Journal

PRINCIPLES	ELEMENTS	TOOLS
Reflection *The process of being able to thoughtfully reflect upon experience is an essential part of the learning process, which can enable greater meaning and learning to be derived from a given situation.*	**Guided Reflection*** **Feedback**	Different tools (for feedback, awareness of personal contribution, for assessing need of change, planning)
Uncovering, Adapting and Building New Mental Maps and Models *The most significant learning occurs when individuals are able to shift the perspective by which they habitually view the world, leading to greater understanding (of the world and of the other), self-awareness and intelligent action*	**Unfamiliar Environments** **Guided Reflection*** **Exchange of Learnings***	Diversity in teams Unfamiliar environments Unfamiliar tasks Unfamiliar relationships Challenging questions Visualisation, "What if" activities
Social Learning *Learning emerges through social interaction and, therefore, individuals learn better with others than by themselves.*	**Exchange of Learnings**	Learning Partners' Debriefs Reflection & Dialogue
Integration *People are a combination of mind, body, spirit, feelings and emotions, and respond best when all aspects of their being are considered, engaged, and valued.*	**Appreciative Approach**	Positive body language of LC Active Listening tool Value the strengths of individuals, Celebrating
	Safe environments	Norms; Contracting
	Holistic involvement of the individual	Activities that include/allow emotions; Mementos; Personal Introductions, R&D
Self Awareness *Building self-awareness through helping people understand the relation between what they feel, think, and act, and their impact on others, is a crucial step to greater personal and professional competence.*	**Learning and Personality Styles**	Framing Designs respecting diverse styles MBTI, HBDI, ECI, Firo B
	Coaching 1 on 1	
	Guided Reflection*	Learning Journal, Personal History
	Feedback*	

PRINCIPLES	ELEMENTS	TOOLS
Repetition and Reinforcement *Practice brings mastery and positive reinforcement increases the assimilation.*	**Sequenced Learning**	Sequenced Design Different activities to check on application, transfer
Facilitated Learning *A specific role exists for an expert in teaching and learning methods and in techniques which can help individuals and groups best learn.*	**Learning Coach**	Roles of a LC: Reflector Teacher Just-in-time Coach Facilitator Designer
Systemic *We live in a complex, interconnected, co-created world, and, in order to better understand and tackle individual and organizational issues, we have to take into account the different systems and contexts which mutually influence one another and affect these issues.*	**Five System Levels**	Different outcomes defined. Different processes, concepts and tools to address those outcomes. Different designs/ activities to address those outcomes **Key Lines:** **Personal:** Processes to include feelings and personal stories, to include the "whole" person: mind, soul, body **Professional and Team**: Tools/techniques and knowledge required for the efficient work on the project **Organizational:** Processes and workshops to deal with organizational challenges, i.e. change, mergers, transfer of learnings, culture, etc **Business:** The project/ challenge to work on

(*) Asterisks indicate the elements that are related to more than one principle.

Contributions of ARL to Action Learning

In the past 30 years MiL and LIM's Learning coaches have applied ARL in many settings, including action learning-type programmes, developing global leaders, helping organisations and their employees meet and solve important challenges, learning to flourish amid change, developing high performing teams and creating viable solutions to critical business issues.

One example of recent work with one manufacturing plant within a large multinational organisation is summarised in Table 2.

Table 2. Elements of an ARL intervention by LIM to develop high performing teams

Organisational challenge and development objectives	Outline of ARL design and duration	Principles (P), Elements (E) and Tools (T) employed	Organisational Outcomes
Threat of closure of the plant meant that the newly formed Senior Leadership Team (SLT) needed to bond quickly, develop a new vision for the site, and engage all employees in executing the vision through cost cutting and changing the culture at the plant.	A High Performing Team Process (HPTP) was designed for the senior leadership team (SLT) and later for their 50 direct reports, the Next Level Leadership Team (NLLT). The first 3 day HPTP for the SLT was followed by a 3 day 'leading the organization through change' workshop with 50 members of the NLLT	**P = Relevance** **E = Ownership** **T = Co-design** Co-design involved two members of the senior leadership team in co-design with the LIM learning coaches. This took place for both workshops with different members of the senior team. This approach also worked well because it overlapped other principles and elements, for example: **P = New Mental Maps and Models** **E = Unfamiliar Environments** **T= Unfamiliar Tasks**	The senior team developed their leadership skills in many different areas through being stretched beyond their familiar environment. In co-design, team members who did not ordinarily take initiative were put into a leadership role within their own SLT. This stretched them to take on new roles and built their confidence, AND it also helped build the team by rotating the role of co-design and creating a safe space in which different team members could try out new tasks and roles.
	In another example, the LIM coaches introduced a fishbowl design, so that the SLT could present their 'draft' mission and vision statements (by talking about it amongst themselves) without interruption and the NLLT could then give feedback on the statements, also without interruption. In examining the design, the specific examples described here can be analysed according to the principles and elements of ARL, which further helps the practitioner embed their learning of the ARL methodology.	**P = Integration** **E = Appreciative Approach** **T = Active Listening, Valuing the strengths of individuals, Celebrating.** The coaches helped the SLT fully adopt an appreciative approach to the feedback, i.e. to process their feelings and reactions to the perceived negative aspects of the feedback. The SLT was able to value and celebrate the fact that their direct reports were able to offer honest feedback. In doing this the SLT were able to prove to the NLLT that honesty was valued and desired. This in turn built trust and fuelled more honest exchange and new ways of the two teams working together. This openness in turn led to increased commitment among the NLLT who saw that their contributions were valued, and was the start of the desired change in site culture.	In defining new ways of working across the organization with their direct reports, the SLT re-defined the culture of the organization from reactive to proactive, from risk averse to risk taking and from passive to actively engaged. It was the ability of the SLT to listen to negative feedback from their direct reports and to realise this as a gift, rather than responding from feelings and being defensive, that was a major learning and turning point. The trust built at that stage was a foundation stone for further change and opened the way to redefining roles and agreeing (contracting) responsibilities.

Conclusion

Action Reflection Learning is a learning methodology that brings together such an eclectic yet powerful combination of paradigms and disciplines that educators of all kinds can benefit from using the principles as a guiding checklist to ensure their instructional designs include aspects that significantly enhance learning.

This approach is especially relevant to action learning practitioners, who can use the principles and elements to guide the design, develop appropriate interventions <u>and</u> manage the facilitation of their programmes to meet the needs of learners in any given situation.

The methodology which we have described in this paper offers the practitioner both flexibility of application and also a rigorous process by which to analyse the components of a learning intervention. In this way, practitioners can enhance the learning of their clients through careful design and also engage in an analysis after the intervention to enhance their own learning.

References

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