

What has action learning learned to become?

Mike Pedler^{a*}, John Burgoyne^b and Cheryl Brook^c

^a*Revans Institute for Action Learning and Research, UK;* ^b*Lancaster University Management School and Henley Management College, UK;* ^c*South Manchester University Hospitals NHS Trust, UK*

Introduction

This inquiry originates in a conversation between the first two authors which concluded with the challenge that a Revans Institute for Action Learning & Research should not only be doing research *by* action learning and but should also be researching *into* action learning itself.

Action learning has been a recognised innovation in management education and development in the UK since a major initiative undertaken in the General Electric Company in 1975 (Casey & Pearce, 1977). Since then interest in action learning has waxed and waned without it either becoming widespread or disappearing. It has continued to develop within a practitioner community associated with Professor R. W. Revans, who is credited as the founder. Action learning has been controversial, especially because of its championing of the ideas of practitioners or action learners over those of experts and teachers.

It is useful to note that action learning emerged in opposition to traditional business school practice. Revans resigned his Chair at the University of Manchester in 1965 following negotiations over the new Manchester Business School, where he describes the victory of the ‘book’ culture of Owens College over the ‘tool’ culture of the then Manchester College of Technology, later UMIST (Revans, 1980, p. 197). He favoured the latter as being closer to the needs of industry and objected to the importation of US business school practice, describing the MBA as ‘Moral Bankruptcy Assured’. Revans anticipated, or perhaps precipitated, the continuing critique of

*Corresponding author. The Revans Centre, Bridgewater Building, University of Salford, Manchester M7 1NU, UK. Email: mike@craglea.demon.co.uk. The authors would like to thank the Foundation for Management Education for their support for the research on which this paper is based.

the MBA, most recently articulated by Mintzberg (2004), who more moderately suggests that MBA might stand for 'Maybe Best Avoided'. Revans' stronger view may be to some extent vindicated by recent empirical research suggesting that firms associated with corporate crime have more managers with MBAs than firms which are not so implicated (Williams *et al.*, 2000).

This inquiry is part-funded by the Foundation for Management Education (FME), and we are grateful to Brian Redfern and his successor, Mike Jones, for their support. Revans, who died in January 2003, aged 95, would no doubt have noted with irony that this was the same FME that funded the Manchester Business School back in 1965. In 2002, the FME was concerned that, if the practice of action learning is growing in the companies and large organisations who are the primary clients of the business schools, why was there so little evidence that these schools are preparing themselves and their staffs for working in this way? Surveys suggest that business schools, of which there are more than 100 in the UK, are making only very modest use of action learning, and are reliant upon more traditional methods, over which there is long-standing criticism (Pfeffer & Fong, 2002). Conclusions from a survey, conducted as part of this present study, of the 2001/2 intake to the International Teachers Programme, set against as survey of professional trainers and developers accessed through the Chartered Institute for Personnel and Development (UK professional body for personnel and development) suggest that action learning is not widely used in UK business schools, and that staff are not generally skilled in the use of this method (see Figure 1).

Given the dominance of the MBA in UK Business Schools, it is perhaps not surprising that interest in action learning has been strongest amongst management development practitioners, with periodic assertions that, for example, it has finally 'come of age' (Levy, 2000). Yet, over the last decade in particular, there has been a growing interest from academics. This is partly demonstrated by the use of action learning on postgraduate and post-experience programmes, but also, importantly, by those who seek to bring a more critical edge to business and management education in general (McLaughlin & Thorpe, 1993; Vince & Martin, 1993; Wilmott, 1994, 1997; Rigg & Trehan, 2004).

This paper summarises our findings to Spring 2004. The provisional tone emphasises the limitations of research that is confined to action learning in the UK. Without expecting to deliver a complete 'fix' on the extent, growth and variety of UK action learning, we hoped to establish a benchmark for future research and also to promote the use of action learning in UK business schools and higher education. Given the wide variations of practice to be found in the UK alone, we decided to stick to what we knew best, and exclude, for example, practice in the USA and Asia, which, according to reports, has expanded greatly in recent years (Marsick & O'Neill, 1999; Marquardt, 1999, 2004).

Background

It has been suggested that effective training and development is one of the 'seven practices of successful organisations' (Pfeffer, 1998). In-company management and leadership development has grown significantly over the last ten years and has apparently contributed to improved organisational performance (Mabey & Thomson,

Data analysed by median score for groups:

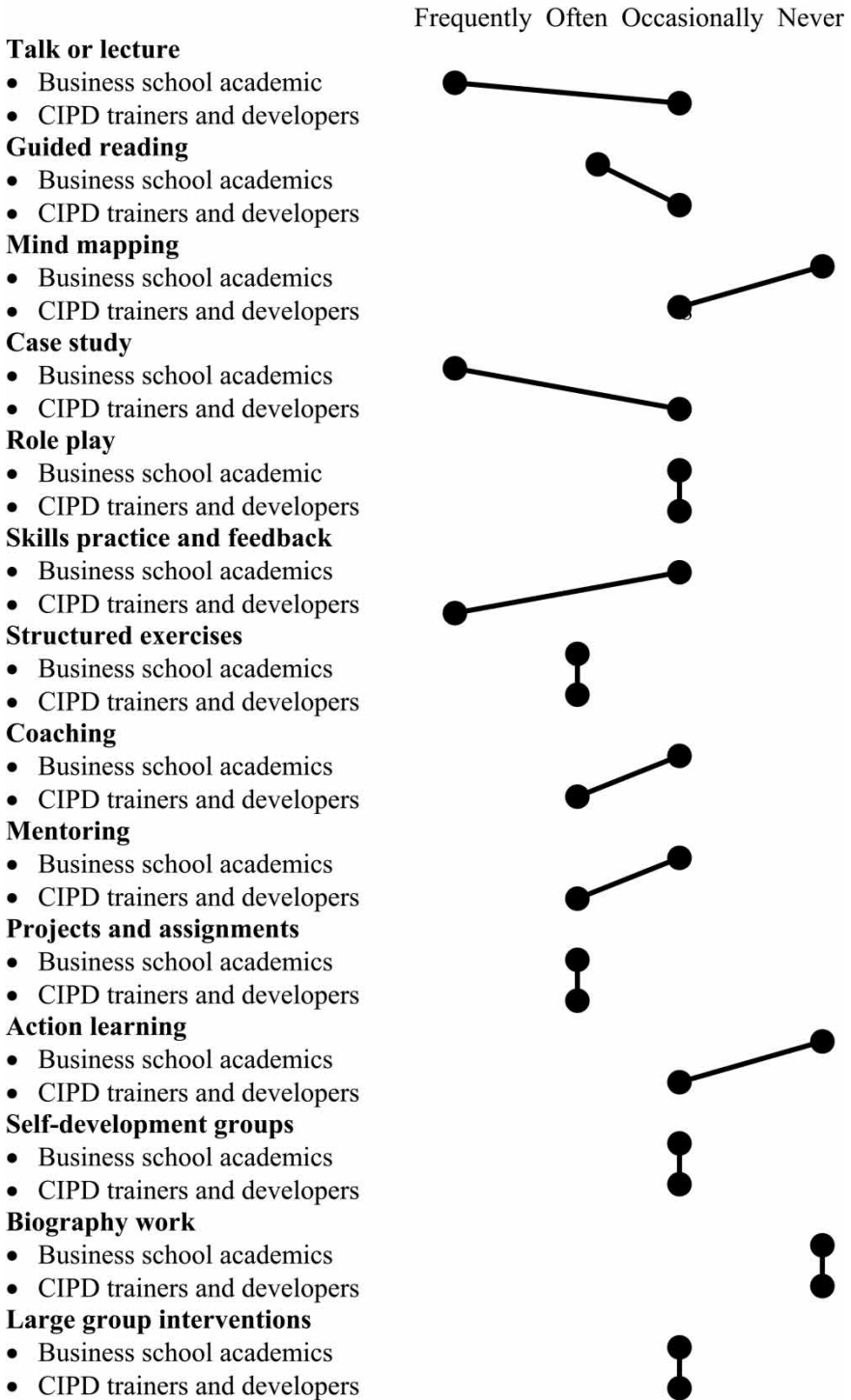


Figure 1. UK business school staff and CIPD trainers and developers' use of teaching methods

2000; Horne & Steadman Jones, 2001). Action learning is part of a cluster of ‘context-specific’ teaching/learning methods that have grown in relation to other educational and development approaches (Mabey & Thomson, 2000; Horne & Steadman Jones, 2001). Some surveys of management development practice have suggested that the use of action learning has grown substantially, alongside coaching and mentoring (Thomson *et al.*, 1997; Mabey & Thomson, 2001).

Action learning can also be seen as part of a wider growth of interest in ‘action approaches’ to management and organisation. Building upon Brooks and Watkins (1994), who present six ‘action inquiry technologies’, Raelin (1999) proposes action research, participatory research, action science, developmental action inquiry, cooperative enquiry and action learning as being amongst ‘the burgeoning action strategies that are now being practiced by organisation and management development practitioners around the globe’ (p. 115). He nominates Kurt Lewin as the founder of ‘action strategies’ where ‘knowledge is produced in service of, and in the midst of, action’, and contrasts these with positivist approaches that separate theory from practice (p. 117).

The current practice of action learning, however, may depart from the ‘classical principles’ proposed by Revans (1998), for example, that learning requires action on intractable organisational problems and is primarily facilitated by a set of colleagues rather than a teacher, trainer or other expert. These principles have been both diluted and criticised: diluted, for example, by the use of the term to describe ‘task forces’ which report findings rather than take action on organisational problems (Dixon, 1997) and variously criticised; for throwing the baby (of teaching) out with the bathwater (McLaughlin & Thorpe, 1993); for being too rational and for neglecting the role of emotions and politics in learning (Vince & Martin, 1993) and for needing a component of ‘critical theory’ if action learning ‘is not to be selectively adopted to maintain the status quo’ (Wilmott, 1994, p. 127). It is important to note that these criticisms are made in the context of aspirations for action learning as a promising means for the developing of a more critical management education (Burgoyne & Reynolds, 1997; Reynolds, 1999; Rigg & Trehan, 2004).

A prime difficulty in researching action learning is the lack of an agreed definition. As Weinstein notes, ‘it means different things to different people’ (1995, p. 32). Revans eschewed any single definition, citing many principles, but defining only ‘what action learning is not’ (1998, p. 87 *et seq.*). Willis (2004) has assembled some 23 of these principles of action learning, and examined a sample of cases in the USA against this ‘Revans’ Gold Standard’. An alternative to this search for a single definition is pursued by Marsick and O’Neill (1999) who define three subcategories of action learning: scientific, experiential and critical reflection.

Research design: aims, study population and methods

Our research was guided by three questions:

1. To what extent has action learning grown in the UK over the last decade?

2. What varieties of action learning are in use? Who is using them and what do they mean by the term? How do these uses compare with the 'classical principles' of Revans' action learning?
3. How may action learning contribute more significantly to business and management teaching? If the action learning approach offers significant advantages, such as helping providers create more productive partnerships with clients, what are the implications for the recruitment development, management and performance management of management teachers and developers?

The first two questions seem to call for straightforward empirical research, whilst the third requires not only the examination of current practice but also for the publicising and disseminating what is already known as well as what may be new. Our research involved reading the literature, telephone interviewing, mail and e-mail questionnaires, regular 'sense-making' conversations between the three of us, and, most recently, making presentations to relevant audiences. As our starting map of the study population, we took the classification identified by the research undertaken for the Council for Excellence in Management & Leadership (CEML). This proposes the following distinguishable but overlapping domains or delivery sites for management and leadership development (CEML, 2002):

- Higher education and business schools.
- Further Education, Learning & Skills Councils, etc.
- Human Resource Development activities in large organisations.
- The Small Business support world—Business Links, etc.
- Organisation and Management Development activities undertaken by large consultancies.
- Organisation and Management Development activities undertaken by small consultancies, sole traders, partnerships.
- Experiential Leadership Development practitioners.
- The emergent e-learning provision sector.

We began in October 2002 by seeking to assemble an action learning community of practice in the first of these domains, which comprises the primary focus for this research. Telephone interviews were conducted with five academics known to us using a structured questionnaire. Each interviewee was asked to name up to five other academics known to them to be similarly engaged in action learning. This 'snowballing' process resulted in 24 interviews that were written up into short accounts of practice.

A second step was to invite responses from a wider community of practice through the distribution of a brief mail or e-mail questionnaire. Calls for informants were published in *People Management* (October 2002 & April 2003); *Management Learning* (March 2003) and the *Training Journal* (April 2003). We also circulated the mailing lists of the Association for Management Education and Development (AMED) (700); the International Foundation for Action Learning (IFAL) (220) and the

Revans' Institute (225). Additionally, the e-mail questionnaire was posted on the website at Henley Management College. By July 2003, this general survey yielded data from 172 informants.

Currently we are conducting telephone interviews with NHS practitioners to develop a matched sample of accounts of practice to compare with our HE respondents. The rich data generated in both sets of interviews will form the basis of a later paper.

Findings

The findings reported here are mainly based on the quantitative aspects of the HE interviews and the general survey.

Higher education

The number of active practitioners resulting from the 'snowball' was only 24. Many respondents named each other, or other departmental members, adding few new names. The network of 'hot spots' extends from Plymouth, Exeter, Glamorgan, Brighton and Middlesex in the South, through Nottingham and Manchester to Strathclyde in the North. The numbers suggest that either the action learning community of practice is very small; or more likely, that our methods (and resources) did not reach far enough. Fourteen of the respondents are located in business schools, with the other 10 in other university departments such as education, health and social work.

(i) *What is action learning?* More than 75% (often much higher) agree on the following key features of action learning:

1. sets of about six people
2. action on real tasks or problems at work
3. learning is from reflection on actions taken
4. tasks/problems are individual rather than collective
5. tasks/problems are chosen independently by individuals
6. questioning as the main way to help participants proceed with their tasks/problems
7. part of an existing programme
8. facilitators are used.

Two other key features of this sample are worth noting:

9. taught elements are included (70%)
10. linked to a qualification (73%)

In this HE sample there is a high level of consensus on the key features of action learning. Some of these reflect the 'classical principles' and would be included in any

'Revans Gold Standard' (2, 3, 6); others are arguably departures to a greater or lesser degree, some of which clearly reflect the HE context (7, 9, 10) and others which may be more in general practice (1, 4, 5, 8).

Several (7, 8, 9, 10) apparently conflict with, or perhaps, require some squaring with the 'classical principles' of action learning. The central questions here are around of the role of teacher (either as teacher or facilitator) and the validity of expert knowledge (P or Programmed Knowledge in Revans' parlance, which he did not dismiss, contrary to some interpretations, but which he did subordinate both to the primacy of Q or Questioning Insight, and to the knowledge of participants, individually and collectively (1998, p. 10/11)). The resolution of these questions is central to the development of action learning within HE; and both are linked to the issue of 'critical action learning' discussed below.

Finally, some (1, 4, 5 & 8) represent departures from Revans' principles and are confirmed in the general survey as widespread features of current practice. It is not possible to be too categorical about describing these as 'departures', partly because Revans endorsed many different forms of action learning at different times in his long career, and also because there has been an evolution of the idea over time, including in Revans' own accounts. However, it is possible to say that, whilst he consistently saw the set as central to action learning, the specified number of 6 is a more recent invention. Revans used the word to describe a relationship where size did not matter so much and also tended to see sets as part of wider networks of sets in organisations, and not as stand-alone entities. Linked to this is the shift to individuals choosing 'own job' problems rather than working on negotiated organisational issues. Revans never endorsed full-time facilitators, but only initiators or 'accoucheurs' to help establish sets, but who do not function as full-time facilitators and leave the sets early in their lives (1998, pp. 12, 109–115).

(ii) *Usage and growth of action learning.* Most of the HE sample began using action learning more than ten years ago (62%), with only four people coming new to it in the last five years. Fourteen out of 24 (58%) are using action more than when they first started; whilst seven are using it less, citing increasing pressure on numbers and costs against the labour intensive requirements of action learning. In terms of the future, most people expected the use of action learning to grow (58%) but some thought that this would be outside the business school in other departments. The limitations to growth are seen as the lack of theoretical input or critical thinking (21%); its resource-rich nature (17%) and its apparently overcomplicated or ill-defined nature—a general qualitative point mentioned by many informants.

The general survey

The questionnaire for this survey contained six questions and was constructed on the basis of what we had learned from the HE sample. The number of respondents (171) is again smaller than expected, and comes disproportionately from the Revans' Institute list (47%). The AMED list of 700 (where interest in action learning was expected

to be high) only produced nine responses. The various calls for informants produced 61 responses in all (including 16 from the Henley website which was advertised in the second *People Management* call (*People Management* reaches the 116,000 members of the Chartered Institute of Personnel & Development (CIPD)).

About one-third of this sample comes from the NHS with another one-third from the small business sector (the Revans Institute being strong in these domains). Higher education (12%), local government (8%), and voluntary organisations (6%) make up most of the rest. From the CEML categories noted above, only five respondents represent the large consultancies and other private sector organisations.

(i) *Nature of involvement.* Of the 171 respondents, 70% are involved in action learning as set members or participants; 53% as facilitators; 45% as designers and 16% as commissioners. Whilst again this profile will reflect a Revans Institute bias (from mainly experienced managers enrolled on postgraduate research programmes) many respondents must be both 'consumers' and providers of action learning, which suggests a congruity between the espoused values of action learning and the behaviour of its users.

(ii) *What is action learning?* With the exception of those factors specific to the HE context, the general survey endorses the picture of key features obtained from the HE sample. More than 75% agreed on the following features:

1. sets of about six people
2. action on real tasks or problems at work
3. tasks/problems are individual rather than collective
4. questioning as the main way to help participants proceed with their tasks/problems
5. facilitators are used.

Additionally, 65% said that:

6. tasks/problems are chosen independently by individuals

although the other 35% said that these were jointly negotiated, which is a much higher figure than for HE and may suggest that more organisational issues are being addressed. The general survey respondents were also asked whether they associated action learning with personal development (75% agreeing) and organisation development (47%). This may be seen as supporting a 'classical principle'—that learning comes from taking action on organisational problems—but it may also support a shift away from this principle towards a more personal development focus for action learning.

(iii) *Usage and growth of action learning.* The general sample have mainly come to action learning in the last five years (46%), or in the last ten years (26%), with only

18% having used it for more than ten years. This is almost a reverse of the HE sample, yet a similar percentage (61%) are using action more than when they first started; and only 11% are using it less. On future use, the general sample mirrors the HE sample: 59% expect to use it more, 24% the same and only 2% less than they do now.

Conclusions

1. The most notable silence in this research is any evidence from large businesses and consultancies. We know, from published accounts and personal experience, that sizable initiatives involving action learning have taken or are taking place in organisations that are barely represented in our sample, such as the Prudential, AstraZeneca and the John Lewis Partnership. This is a particular limitation on the findings, especially if these companies are the prime clients for the business schools.
2. Despite the lack of an agreed definition, action learning is well understood in terms of the key practice features. It may be true that beyond this relatively small sample, action learning is not so well understood or recognised and that this is a factor inhibiting its growth. However, action learning appears to have spread as an 'ethos' (general way of thinking about learning), as well as method (specific set of practices) which we have mainly surveyed here (see below).
3. It is also clear that, when current practice is compared with Revans' 'classical principles', however hard these may be to pin down to a single list, there have been significant departures or evolutions. Chief amongst these are the use of permanent facilitators (sometimes called 'expert facilitators' or 'skilled coaches' in published accounts) and the adaptations apparent in HE where action learning is used as part of qualification programmes involving teaching.

It also appears that action learning has become more focused on personal development and less centred on organisational problems. The shift to individual choice of problems or tasks, and away from negotiated agreements with the sponsors or commissioners of action learning in the organisation, indicates that the chosen tasks are likely to be 'own job' issues, discussed in small sets of six, relatively isolated from the wider organisational context.

4. Different practices and approaches to action learning are being developed in different locations and communities. There is wide agreement on a common ethos or set of classical principles, but wide variations in practice. It is no longer safe to think about action learning as a unitary practice. To the question 'What is action learning?' can be added a second, 'What can the different communities of practice of action learning learn from each other?'
5. On this evidence, estimates of the extent or growth of action learning in the UK over the last decade remain inconclusive. Despite the success of our efforts to place calls for informants, the response suggests a relatively small overall community of practice; yet published accounts and personal sources seem to contradict this, suggesting a wider and growing usage not represented in our sample. One business school colleague, from outside the sample, said recently that 'action learning is now mainstream' in management development circles.

6. In the future, both HE and general survey respondents expect the use of action learning to grow, and most expect to use it more personally.

Discussion

Our inquiry process began in conversation and continued in that way; we generated an engaging discussion in our little research group. This centred on a number of issues and ‘silences’ in the research, most of which still remain unresolved. Despite the limitations, the findings so far reveal a picture of a living practice that is changing and developing. The difficulties in assessing growth and spread turn partly upon definitions—what do we mean by action learning? If all variants and practices which are called ‘action learning’ are accepted as such, then, although we can’t put numbers on it, the practice appears to be spreading and growing, albeit slowly and selectively. But has the Revans’ concept become diluted in wider use? Has the spread of action learning been at the cost of eroding Revans’ ‘classical principles’ (RCP)?

Definition remains a central concern. The pictures of action learning that emerge from the HE interviews show great variations in personal practice, despite broad agreement on the key features or principles in response to the interviewing process. One respondent who has worked with action learning over many years, suggested that it could take place in a well-run seminar led by a staff member. This led us to the question: is action learning best seen as a *method* with some defined and describable processes, or as an *ethos*, a set of abstract principles not attached to any particular form of implementation?

On this point, our research leads us to suggest that it is useful to distinguish between action learning as a method, defined by some of the main practices described here, and action learning as ethos, a general approach to learning from experience through engaging with actual work challenges rather than ones described (case studies) or simulated (business-gaming, role-playing) in classroom situations. Our data suggest that action learning as ethos has disseminated more generally in the management education and development community (and subcommunities).

What is action learning for?

As there is no single definition or list of principles of action learning endorsed by Revans himself, or agreed up on by others, the notion of Revans’ ‘classical principles’ (RCP) is a construct, a shorthand for the consistencies in a reading of his considerable writings over more than 50 years. Whilst the definitional dispute is not essential to our purpose here, let us say, for example, that RCP includes:

- the requirement for action as the basis for learning
- profound personal development resulting from reflection upon action
- working with problems (no right answers) not puzzles (susceptible to expert knowledge)
- problems being sponsored and aimed at organisational as well as personal development

- action learners working in sets of peers ('comrades in adversity') to support and challenge each other
- the search for fresh questions and 'q' (questioning insight) takes primacy over access to expert knowledge or 'p'.

In so far as these are representative of RCP, then our findings demonstrate considerable shifts in current practice, for example towards:

- 'own job' projects
- sets of six
- expert facilitators
- integration into teaching programmes.

These shifts can be seen either as dilutions or evolutions of RCP. The interpretation favoured depends partly on whether action learning is seen primarily as a method or as an ethos, and also upon the fundamental question of what action learning is for?

To answer this question, we first describe briefly some varieties of action learning practice in use in the UK today that are dilutions or evolutions of RCP. Current practice (Figure 2) reflects different impulses and circumstances and reveals some radical variations and alternatives to RCP, including:

- Critical Action Learning (CAL)
- Auto AL
- Action mentoring
- Online and remote action learning
- Self-managed Action Learning (SMAL)
- Business-Driven Action Learning.

Critical Action Learning (CAL). Revans' writings make frequent references to learning from action in situations of risk and confusion, to learning about power, politics and struggle in the process. However, McLaughlin and Thorpe (1993) criticise conventional practice in proposing a critical alternative that reveals the primacy of politics and power in the 'mobilisation of bias' in decision-making and action. CAL is both a critique of current practice and an attempt to harness action learning in enacting the abstract principles of critical theory. Wilmott (1997) criticises conventional action learning for tending to 'individualise and psychologise the diagnosis of problems in a way that disregards their embeddedness in the structural media of power relations' and suggests that:

Critical action learning explores how the comparatively abstract ideas of critical theory can be mobilised and applied in the process of understanding and changing interpersonal and institutional practices. By combining a pedagogy that focuses upon management as a lived experience with theory that debunks conventional wisdom, managers can be enabled to develop 'habits of critical thinking . . . that prepare them for responsible citizenship and personally and socially rewarding lives and careers'. (p. 173)

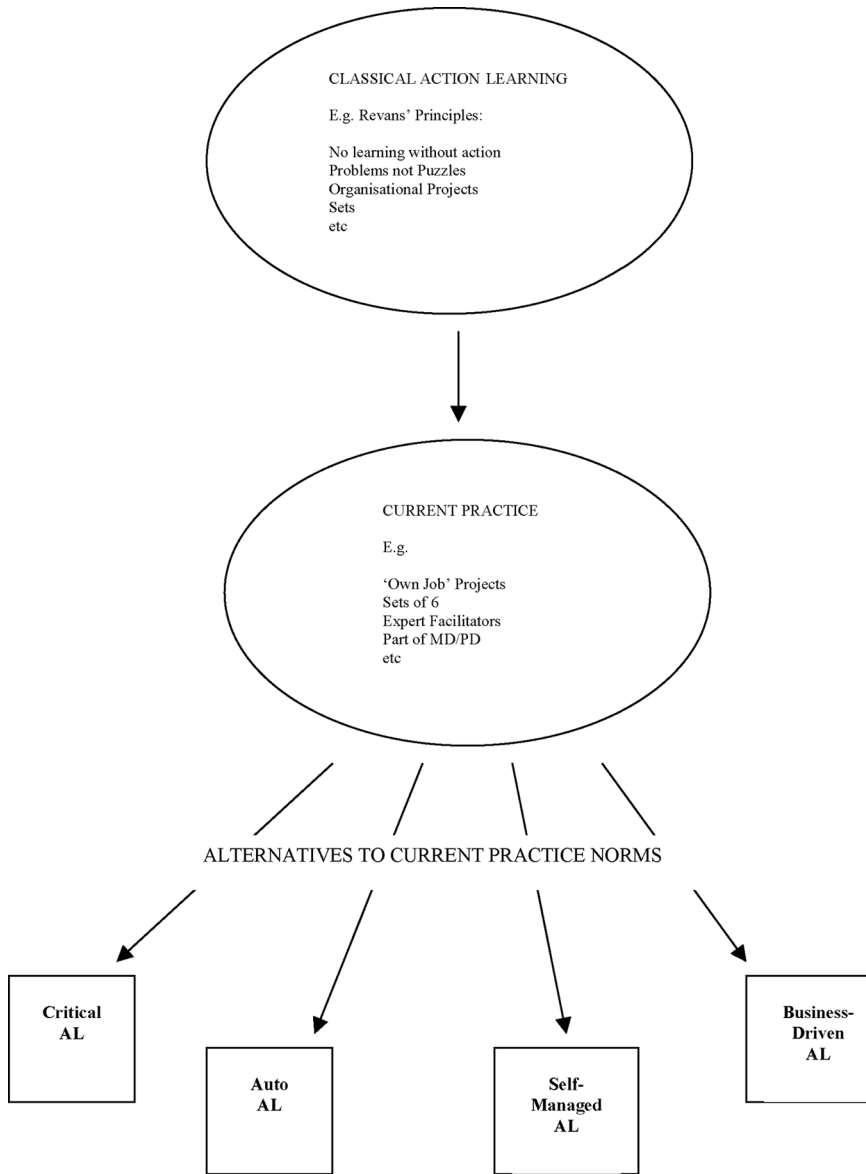


Figure 2. Classical action learning, current practice and some alternatives

A number of questions are posed by the CAL hypothesis, particularly that it seems to exist as a concept rather than a practice, although Rigg and Trehan (2004) is a notable attempt to enact it.

Auto AL. This idea challenges one of the classical principles, namely the requirement for the set of peers which Revans refers to as the ‘cutting edge of every action learning programme’ (1998, p. 10), in favour of a repeated discipline of holding oneself to

account for action against a set of questions. In a case study (Learmonth & Pedler, 2004), a manager embarks on a process of building capacity for a regional public health policy via 'auto-action learning' with the help of an 'Action Learning Problem Brief'. The six questions of the problem brief

- describe your problem situation in one sentence
- why is this important? (i) to you, (ii) to your organisation, (iii) to NE England?
- how will you recognise progress on this problem?
- who else would like to see progress on this problem?
- what difficulties do you anticipate?
- what are the benefits if this problem is reduced or resolved?

are used as a tool for tracking action, learning and change over time. The action learner recorded her repeated responses to these questions at monthly intervals for eight months, which led to reflection, learning and options for further action. This variety of action learning is very different from the CAL perspective, in relying upon the sole action learner and her problem, where CAL disputes even the ability of the set to provide the wider critical frame.

Action mentoring or coaching. There are a number of examples of people describing their coaching or mentoring work as 'one-to-one action learning'. A mutual relationship of peers would be closest to RCP. In one case, two people, the last remaining members of an action learning set, helped each other to complete their PhDs; in another, two academic colleagues report working together on this basis for almost ten years using a framework not dissimilar to that used in the auto-action learning example above.

Online and remote action learning. Examples include working in sets on a master's programme and one-to-one. One respondent noted a programme for online auto-action learning which asks questions to facilitate reflection and learning. Action learning in real time via telephone conferencing or CCTV makes it possible for a remote facilitator to join a set which meets hundreds of miles away and at least one US university convenes global action learning sets in this way.

Self-Managed Action Learning (SMAL). O'Hara, Bournier and Webber describe SMAL as 'an innovation in the practice of action learning which enables managers to facilitate their own action learning sets and in so doing, develop the skills of facilitative management' (p. 1). Following Revans' promptings, Bournier and his colleagues de-emphasise the role of the facilitator, limiting it to that of providing initial advice and encouragement, and instead emphasise the skills required of the action learner working in the set (Bournier, Beaty & Frost, 1997). Unlike other forms listed here, which can be seen to dilute RCP in some way, SMAL actually strengthens a key classical principle in challenging an often taken-for-granted aspect of current action learning practice.

Business-Driven Action Learning. In this approach, groups work on projects identified by senior managers and make recommendations for action. This form of action learning is organization-focused and emphasises problem-solving (Boshyk, 1999, 2002), but there is much less emphasis on the personal development aspects that are of central importance in RCP. This form has sometimes been described as being more akin to that of the taskforce rather than action learning (Dixon, 1997), and in her survey of ten US cases, Willis (2004, p. 25) notes that they ‘do not furnish strong, convincing evidence that Revans’ theory-intact is being practiced anywhere in US organisations’.

Action learning as ethos

Should we welcome these variations as evidence of the growth, proliferation and healthy life of action learning practice, or deplore these dilutions, departures and deviations from the ‘classical principles’?

The answer to this question cannot be found in empirical analysis, but requires references to the purposes of action learning and the values of its practitioners. Lyotard’s argument regarding the purposes of knowledge provides a framework for thinking about the positioning of action learning (Lyotard, 1984; Burgoyne, 1994). In response to the question: what is knowledge for; what is its purpose?; three main meta-narratives are suggested:

- speculative: knowledge for its own sake, concerned with theoretical rigour, unconcerned with application
- emancipatory: knowledge that helps us overcome oppression and attain the highest human potential
- performative: knowledge that helps action in the world, to resolve problems, to produce better goods and services.

Where does action learning fit? As concerned with action in the world and with the learning that results, action learning may be positioned on the line between P & E, and furthest from S (see Figure 3). Action learning is optimistic, humanistic, engaging, but also pragmatic and sceptical, suspicious of canonical ideas (and the experts who trade in them) and distrustful of speculative knowledge untested in action. By contrast Operational Research falls between P & S, being concerned with the solution to practical concerns through the application of theory, and is perhaps the least concerned with human development. Critical Theory lies between S and E, being both concerned to build theory and emancipatory in intention, but is least concerned with practical action and reality testing.

According to Lyotard, in post-modern times there is no dominant grand narrative; all is now local and provisional. This view allows action learning to be less fixed and to occupy more than one location in the triangle, depending upon the perspective taken. This enables us to explore the shifts in the practice of action learning from RCP as departures, dilutions and deviations or as evolutions and variations.

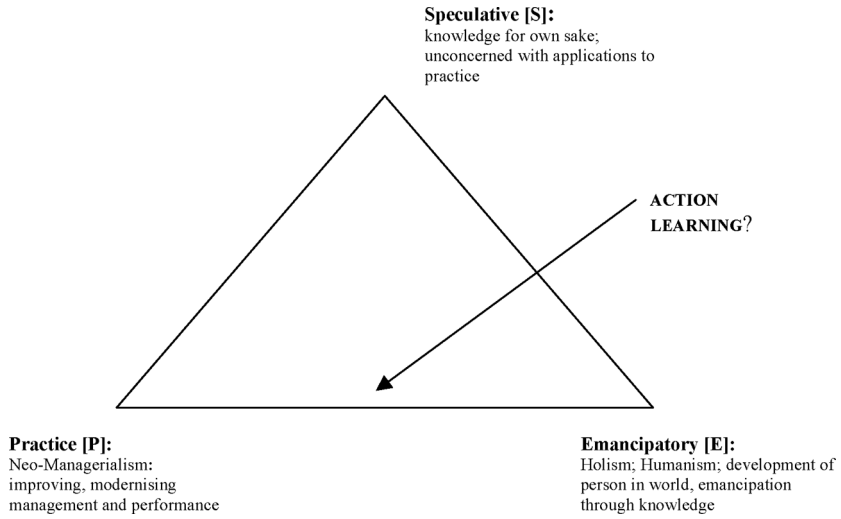


Figure 3. Lyotard's triangle

From an evolutionary perspective, it can be argued that the biography of Revans' action learning idea, closely coupled with that of its founder, shows movement round the triangle over time. Trained as a physicist, by the late 1950s Revans was professor of management at Manchester, and his papers from this time are concerned with organisational performance and with managerial and administrative efficiency. They report on research in schools, mines, factories and hospitals, via the measurement and comparison of variables such as accident rates, disputes, absenteeism and comparative lengths of patient stay. He was then in more of an operational research mode, and although he was acutely aware of the importance of the knowledge and learning of those who do the jobs, these papers do not use the term 'action learning' at all. Ten

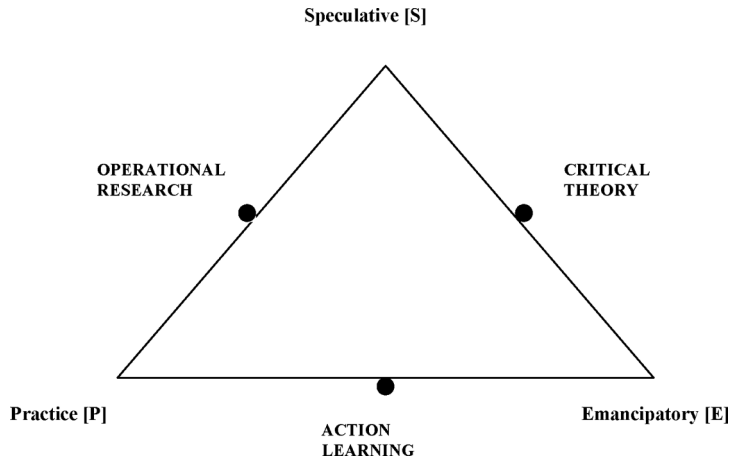


Figure 4. Three ethical stances

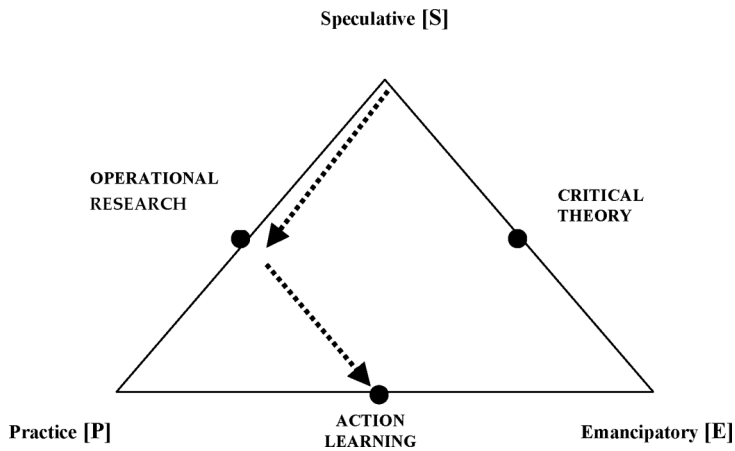


Figure 5. A trajectory of action learning

years later human factors such as communication have come to the fore (especially in the Hospital Internal Communications [HIC] Project 1965–8), and by the 1970s, individual learning and personal development are central to what is now called action learning (Revens, 1982). Revans' journey can thus be pictured as starting from the top of the triangle, then moving over to a mid-point on the left-hand line as he became concerned with practical applications, and finally moving to the mid-point of the bottom line as he became convinced of the centrality of human action and learning in the improvement of organisational performance and effectiveness (Figure 5).

Secondly, if action learning can change in use over time in any given practice, then it may be argued that it can vary at any one time in different personal or community practices. Some current variations can be sketched on the triangle to illustrate the different positions both in terms of actual practice and in the ethical stance with regard to the purpose and value of knowledge.

Traders or guardians?

Jacobs (1992) described two 'moral syndromes': those of the Commercial or Trader and the Guardian. She traces these moral syndromes back to the earliest civilisations and the line drawn between those who traded goods and the hunters and gatherers who established and held territory. From an action learning perspective we can choose to be Guardians, scrutinising Revans' texts and seeking to uphold RCP in the face of various dilutions, departures and deviations; or we can be Traders, travelling to different communities of practice, exploring variations, learning from them and modifying our own practice accordingly. However, Jacobs notes that when the two moral syndromes are confused or their precepts not lived up to, 'monstrous hybrids' or 'systematic moral corruption' may result.

Revens' writings provide support for both moral syndromes, being shot through both with references to the antiquity of the idea of action learning, reminding us how easy it is

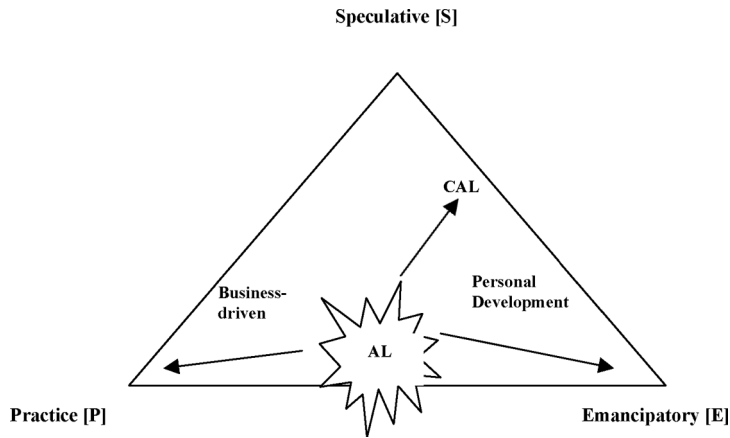


Figure 6. Some current varieties of action learning

to forget and to fall away from the simple but demanding essences; and with encouragements to seek out, engage with and learn with and from others who share our concerns. Despite his assertion that ‘It is the culture of the tool rather than that of the book which now offers Britain its rewards’ (1982, p. 188), this dilemma is not so easily squared. Action learning seen as just a tool soon becomes cast in particular forms, which inevitably decay or do not travel; without the keepers of the books, it becomes hard to re-invent, rediscover and generate new forms. Can we manage to be both Guardians of the ethos and Traders of our methods?

Some implications for teachers in business schools and higher education

The answer to this question is central to any advice that may be given to higher education and business school teachers, and to management developers working in other domains. How should the Guardian in us respond to the teacher quoted earlier who claimed there was no difference between action learning and the way he ran his seminars? If action learning was simply a method with a defined and describable process, it would be easy to pass on, but as it is also an ethos not attached to any particular form of implementation, then that suggests an extended learning and participating process such as working in an action learning set or sets. The teacher in the sample above was experienced in action learning and can perhaps run his seminar in that way; another less experienced could not.

A key purpose of this research was to assess how action learning approaches may contribute more to business and management teaching. Surveys suggest that business school education remains dominated by the traditional lecturing and case studies and that action learning is not widely used, nor are business school staff generally skilled in its use (see Figure 1). Whilst some business school staff are aware of the newer learning theories such as activity theory (see Blackler, 1993) and situated learning (Lave & Wenger, 1991), which provide a theoretical underpinning for action learning approaches, this does not seem to be reflected in their practice. This suggests an

‘espoused theory’ of action learning without the ability to translate it into practice and ‘theory in use’.

Action learning offers teachers in business schools and higher education a number of opportunities:

- Action learning is a context-sensitive approach that can link generalised or theory-based teaching with the actual business problems faced by participants on higher education programmes.
- Understood as an ethos, the pluralisation of action learning into many forms makes it a highly malleable approach, which is widely applicable to many educational relationships and situations.

Taken together, these two advantages mean that business schools using action learning should be able to help their clients more than they do currently. The possibilities include:

- the Continuing Professional Development (CPD) and ‘Aftercare’ market in higher education (‘Outreach’ is one of HEFCE’s four purposes)
- consortial cross-boundary sets
- opportunities in helping clients to develop the general practice of action learning; for example in helping them to understand and develop:
 - the general learning model of action learning
 - practice in the form of the learning set
 - facilitation skills practice
 - participation skills practice
- resourcing facilitation in the broader sense, e.g. through SMAL so that sets can self-sustain, possibly with manuals, etc.

Areas for further research

There are important questions not addressed here, which seem obvious avenues for further inquiry:

- (1) What is the evidence for the effectiveness of action learning in its various forms?
- (2) What is the scale, extent and form of the use of action learning in corporate settings?
- (3) (Using a distinction from Day, 2001). To what extent does action learning support the development of management and leadership ability as social capital (collective capacity), as well as the development of the human capital (the sum total of individual ability) which is the normal aim of education and training programmes?

Notes on contributors

Mike Pedler is a Revans Professional Fellow at the Revans Institute for Action Learning & Research, UK and Editor of *Action Learning: Research & Practice*. He works with people on learning and

development processes in organisations especially through action learning, the learning organisation and leadership development.

John Burgoyne is Professor of Management Learning in the Department of Management Learning in the Lancaster University Management School and Henley Management College. His primary interest is in management, leadership and organisation development, and the fundamental question of how learning does and can create individual and collective management and leadership capability to enable valuable organisational performance.

Cheryl Brook is currently Head of Training at South Manchester University Hospitals NHS Trust. She is writing a PhD thesis on the practice of action learning in the NHS.

References

- Blackler, F. (1993) Knowledge and the theory of organisations: organisations as activity systems and the reframing of management, *Journal of Management Studies*, 30, S863–864.
- Boshyk, Y. (Ed.) (1999) *Business-driven action learning: global best practices* (London, Palgrave Macmillan).
- Boshyk, Y. (Ed.) (2002) *Action learning worldwide: experiences of leadership and organisation development* (London, Palgrave Macmillan).
- Bourner, T., Beaty, L. & Frost, P. (1997) Participating in action learning, in: M. Pedler (Ed.) *Action learning in practice* (London, Gower), 279–290.
- Brooks, A. & Watkins, K. (1994) *The emerging power of action inquiry techniques* (San Francisco, CA, Jossey Bass).
- Burgoyne, J. G. (1994) Managing by learning, *Management Learning*, 25(1), 35–55.
- Burgoyne, J. & Reynolds, M. (Eds) (1997) *Management learning: integrating perspectives in theory & practice* (London, Sage).
- Casey, D. & Pearce, D. (Eds) (1977) *More than management development: action learning at GEICI* (Aldershot, Gower Press).
- CEML Reports (2002) Available online at: <http://www.managementandleadershipcouncil.org/>
- Day, D. D. (2001) Leadership development: a review in context, *Leadership Quarterly*, 11(4), 581–613.
- Dixon, N. (1997) More than just a task force, in M. Pedler (Ed.) *Action learning in practice* (3rd edn) (Aldershot, Gower Press), 329–338.
- Horne, M. & Steadman Jones, D. (2001) *Leadership: the challenge for all?* (London, Institute of Management & Demos).
- Jacobs, J. (1992) *Systems of survival: a dialogue on the moral foundations of commerce & politics* (London, Hodder & Stoughton).
- Lave, J. & Wenger, E. (1991) *Situated learning: legitimate peripheral participation* (Cambridge, Cambridge University Press).
- Learmonth, A. & Pedler, M. (2004) Auto Action Learning: a tool for policy change? Building capacity across the developing regional system to improve health in the North East of England, *Health Policy*, 68(2), 169–181.
- Levy, M. (2000, December 20) Sage of reason, *People Management*, pp. 24–26.
- Lyotard, J-F. (1984) *The postmodern condition: a report on knowledge* (Manchester, Manchester University Press).
- Mabey, C. & Thomson, A. (2000) The determinants of management development, *British Journal of Management*, 11, Special Issue, S3–16.
- Mabey, C. & Thomson, A. (2001) *The learning manager: a survey of management attitudes to training and development at the millenium*. Institute of Management.
- Marquardt, M. J. (1999) *Action learning in action: transforming problems and people for world-class organisational learning* (Palo Alto, CA, Davies-Black).
- Marquardt, M. J. (2004) *Optimising the power of action learning* (Palo Alto, CA, Davies-Black).

- Marsick, V. & O'Neill, J. (1999) The many faces of action learning, *Management Learning*, 30(2), 159–176.
- McLaughlin, H. & Thorpe, R. (1993) Action learning—a paradigm in emergence: the problems facing a challenge in traditional management education and development, *British Journal of Management*, 4(1), 19–27.
- Mintzberg, H. (2004) *Managers not MBAs* (London, Financial Times, Prentice Hall).
- O'Hara, S., Bourner, T. & Webber, T. (2004) Self managed action learning: theory and practice, *Action Learning: Research & Practice*, 1(1), 29–42.
- Pfeffer, J. (1998) *The human equation: building profits by putting people first* (Cambridge, MA, Harvard Business School Press).
- Pfeffer, J. & Foug, C. (2002) The end of business schools? less success than meets the eye, *Academy of Management Learning and Education Journal*, 1(1), 78–95.
- Raelin, J. (1999) Preface to special issue: the action dimension in management: diverse approaches to research, teaching and development, *Management Learning*, 30(2), 115–125.
- Revans, R. W. (1980) *Action learning: new techniques for managers* (London, Blond & Briggs).
- Revans, R. W. (1982) *The origins & growth of action learning* (Bromley, Chartwell Bratt).
- Revans, R. W. (1998) *ABC of action learning* (London, Lemos and Crane).
- Reynolds, M. (1999) Grasping the nettle: possibilities and pitfalls of a critical management pedagogy, *British Journal of Management*, 10(2), 171–184.
- Rigg, C. & Trehan, K. (2004) Reflections on working with critical action learning, *Action Learning: Research & Practice*, 1(2), 149–165.
- Thomson, A., Storey, J., Mabey, C., Farmer, E. & Thomson, R. (1997) *A portrait of management development* (London, Institute of Management).
- Vince, R. & Martin, L. (1993) Inside action learning: an exploration of the psychology and politics of the action learning model, *Management Education and Development*, 24(3), 205–215.
- Weinstein, K. (1995) *Action learning: a journey in discovery and development* (London, HarperCollins).
- Williams, R. J., Barrett, J. D. & Brabston, M. (2000) Managers' business school education and military service: possible links to corporate criminal activity, *Human Relations*, 53(5), 691–712.
- Willis, V. (2004) Inspecting cases: prevailing degrees of action learning using Revans' theory and rules of engagement as standard, *Action Learning: Research & Practice*, 1(1), 11–27.
- Wilmott, H. (1994) Management education: provocations to a debate, *Management Learning*, 25(1), 105–136.
- Wilmott, H. (1997) Critical management learning, in J. Burgoyne & M. Reynolds (Eds) *Management learning: integrating perspectives in theory & practice* (London, Sage), 161–176.