ACTION LEARNING RESOURCES

Finding What Matters

2024

Action Learning



Action Learning
Typical Meeting Structure

Check-in	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. This allows for agenda items to be listed and also for people to share the "headlines" of their experiences since last time.
Bidding Round	Each set member asks for the time he or she wants for discussing issues. Not every set member needs to present in every meeting.
Agreeing the order of the day	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. 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. The set will also need to decide on who will keep time and take notes in a self-facilitating set.
Individual Time Slots	This is the body of the set meeting, when individuals take a period of time to talk through: • what he or she has done, or learnt, • plans for future activity, • responses to events since the last meeting.

Action Learning
Typical Meeting Structure

Presenter outlines thier issue	The presenter describes their issues as clearly and concisely as possible and what outcomes they would like.
Set members ask clarifying questions	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.
The presenter responds	The presenter then takes time to summarise their progress on the issue and any next steps they plan to take.
OPTIONAL: Resource Round	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.
The next presenter speaks	The process of presenting/questioning/reflecting /reviewing starts again
Set Meeting Review	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.

Action Learning
Typical Meeting Structure

Review of Set Process	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.
Check-out	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. A suitable ending to a set meeting may then be for each member to consider the following questions: • What did I want? • What did I get? • How do I feel?

Action Learning
Suggested Plan for the First Meeting

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.

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.

Introductions

Members to introduce themselves to the set by considering the following questions:

- 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 things 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 coaching 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)

Decide who will keep time and take notes for the meeting.

Decision Making

Members to discuss and agree their code of conduct. This should be recorded in the meeting notes. 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. Meetings should usually be around 4-6 weeks apart to allow for actions to take place.

Action Learning
Suggested Plan for the First Meeting

"Getting to know each other" activities

Some suggested activities for this section – you do not need to do all of these activities.

- Self-portrait 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)
  - 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 coaching concern or focus – a specific part of your coaching 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

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 further. When everyone has told their story set members may feedback what they have gained or learnt from the experience.

Action Learning
Suggested Plan for the First Meeting

"Getting to know each other" Activities continued

Lifeline

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.

Life Shield

Divide your page into quarters and draw images in each quarter relating to the following headings:

- My life at work
- My life at home

Bidding Round

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.

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.

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.

Action Learning
Suggested Plan for the First Meeting

Presenting

Each presenter takes their turn to present/tell their story however they wish.
This is followed by clarifying and open questioning.
The presenter then decides upon their actions / next steps and shares these with the set.
Optional: Resource sharing – each set member offers the presenter a resources such as a contact, a website, a positive affirmation.

This process is repeated for each presenter.

Reflection

The first meeting ends with a reflection on the meeting.

This could take the form of:

- 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

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.

Confirm date and time of next meeting.

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.

Adapted from The Action Learning Handbook: McGill and Brockbank, 2004

Action Learning
Problem Brief

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 coaching work?

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

Action Learning
Problem Brief

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

How do you intend to go about tackling the 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 coaching work?

Action Learning Questions

Clarifying Questions:

- After the presentation, the set members are invited to ask the presenter for clarification on anything that remains unclear, or where there might be ambiguity in their story. The objective is to get really clear about the presenter's story before the open questions begin.

- For example, clarifying questions might include:
  - "When you said that Ben had previously been told about the situation, do you mean Ben, your brother, or Ben, your son?"
  - "You mentioned that Sally already knew about the meeting, do you know how she found out?"

Open Questions:

- 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 to use that coaching approach?' it could instead be phrased as 'What is it about that coaching approach 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.

Action Learning Questions

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?

You can use any other powerful coaching questions that feel appropriate in the moment, along with techniques such as pausing to reflect:

'Let's take a moment to notice what feels important from our discussions so far'

Action Learning
Record Of Set 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:

Action Learning
Reflection and Set Meeting Review

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:

1.
2.
3.

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?

From Action Learning Overview: M.Pedler, 2005

Action Learning
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.

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 others?

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

What are we gaining as a group?

Action Learning
Set Process Review

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?

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

Action Learning
Action Points

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

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

Action Learning
Action learning: Self-facilitating sets

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.

adapted from 'The Action Learning Handbook', McGill & Brockbank 2004

Action Learning
Action learning: Self-facilitating sets

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.

adapted from 'The Action Learning Handbook', McGill & Brockbank 2004

Action Learning
Suggested Structure For The Last Meeting

Check in

Each member feeds back on any actions taken 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 complete an evaluation form.

Action Learning
Suggested Structure For The Last Meeting

Activities for your final meeting

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.'

Activities for your final meeting, The Ending Game (Ross, 1991 - adapted for virtual meetings)