

Action Learning

Action learning is a process by which we enlist a group of colleagues to help us think differently and clearly about a problem, project, process, or action.

Action learning is a process that becomes a vehicle for learning through our experiences and through the help of colleagues, both expert and “non” expert.

Step One: Identify the Problem to be Addressed

- **We invoke input from colleagues as their questions challenge us to clearly identify the problem and to understand some of the underlying causes.**
- **Our colleagues input regarding our problem is important because their questions provoke us to re-examine already held assumptions, and to think in new ways.**
- **Action learning provides the opportunity for participants to learn from each other’s perspectives, successes, and mistakes.**
- **The process of action learning should be both supportive and challenging for the team members.**
- **Action learning helps us explore the reasoning behind individual and group assumptions.**
- **Colleagues question, “Is this really the problem?” “Why do you think it is the problem?” “Could the problem be...?”**

Step Two: Questioning and Reflection

- **Colleagues help us examine potential answers to problems that may previously have appeared impossible.**
- **Colleagues who might be considered "non" experts on the topic may have opinions that can provide a valid, although different, view of the problem and potential solutions.**
- **The wisdom of colleagues helps challenge our thinking and supports us in taking risks (emotional, cognitive, or behavioral) and taking actions for change.**
- **Action learning allows us to acknowledge mistakes publicly to the team and frame them as learning experiences.**
- **Colleagues demonstrate an interest in helping one another to solve the problem.**
- **Colleagues demonstrate the ability to listen and to question self and others.**
- **Colleagues demonstrate a willingness to be open and to learn from other team members.**

- **Colleagues are aware of ones own and other’s ability to learn and develop.**
- **Colleagues ask the “right question”, not questions that steer one to a particular solution. Some right questions are like these.**
 - **What is the organization (you/we) seeking to accomplish?**
 - **What is stopping us from accomplishing it?**
 - **What can we do about the barrier(s)?**
 - **Who knows what you/we are trying to do?**
 - **Who cares about addressing the problem?**
 - **Who cares about getting the solution implemented (vested interest/stakeholders)?**
 - **Who can get the solution implemented (has the power/controls the resources)?**
- **Utilize Systems Thinking in identifying, reflecting on, and developing solutions to the problem.**
 - **Thinking in terms of whole systems is crucial to solving complex problem.**
 - **Develop a discipline for seeing the whole, seeing interrelationships rather than linear cause-effect chains, seeing underlying structures rather than events, seeing patterns for change rather than snapshots.**
 - **Organizations are like giant networks of interconnected nodes. Any change in one node can cause a change in other nodes.**
 - **If systems’ thinking is applied, the original problem is rarely the problem that ends up being addressed. Action learning allows us to uncover layers to an issue.**
 - **Reframe the Problem:**
 - **Is the presenting problem a symptom of a more significant problem?**
 - **Who will be affected if we resolve this problem?**
 - **How will they be affected?**
 - **What are the possible sources of the problem?**
 - **What people are most involved with the problem?**

- **Do these people have insights or perspectives that my help clarify the problem?**

Step Three: Taking Action

- **The action learning process is built on the premise that no learning occurs without action.**
- **Develop Alternative Solutions**
 - **What are the possible ways in which this problem could be solved and stay solved (not just a first layer solution).**
 - **What is the impact of each of the alternative solutions?**
 - **What is preventing us from solving this problem?**
 - **Of these obstacles, which are major?**
 - **How realistic is/are the solutions in terms of goals and resources of the organization?**
 - **How effective will this solution be in solving the problem?**
 - **Are there new problems that might be created by this solution?**
- **Encouraging Action: The most valuable learning occurs when participants “reflect on their action, not just on their planning.” Action learning is about taking action. Colleagues can question one another to spur action by:**
 - **How can we/you move forward on this problem?**
 - **How would someone you most admire deal with this situation?**
 - **Can you think of three options for actions?**
 - **What are the pros and cons of these actions?**

Step Four: Reflection

- **What steps are you going to take before we meet again?**
- **What have you /we learned?**
- **What do you/we need most from us now?**
- **What barriers are facing you/us now?**
- **What actions need to be taken to deal with or remove these barriers?**

- **Who knows what you/we are trying to do?**
- **And, again - Who cares about addressing the problem?**
- **Who cares about getting the solution implemented (vested interest/stakeholders)?**
- **Who can get the solution implemented (has the power/controls the resources)?**

Reference Material:

Marquardt, Michael J. ,*Action Learning in Action: Transforming Problems and People for World-Class Organizational Learning*; Davies-Black Publishing; Palo Alto, California, 1999

Read especially:

Part 1:

**Chapters 1: Emergence of Action Learning in a World of Change
Chapter 2: Six Essential Elements of Effective Action Learning**

Part 2:

**Chapter 4: Problem Solving
Chapter 7: Leadership Development
Chapter 8: Personal Development**

Part 3:

Chapter 13: Avoiding the Pitfalls

Environmental Public Health Leadership Institute

Action Learning Coaching for Mentors

Each Fellow team will be assigned a mentor to assist them throughout the year. The purpose of this component of the program is to generate a collaborative, action-learning environment so individuals can learn from each other.

Fellow teams will interact with their mentor at least seven (7) times during the year. Three of these interactions will take place in person at the Fellow retreats. Four interactions will occur over the phone. Other interactions can occur via email or other modes of communication comfortable to both the Fellows and the Mentor.

The face-to-face contacts will occur at the onsite meetings. Mentors will be present at each of the Fellow retreats.

Responsibilities of the Action Learning Mentor:

- Meet with the Fellow team on at least seven occasions to:
 - Clarify the action learning process
 - Model the action learning process
 - Facilitate discussions around each member's efforts at building particular leadership skills
 - Ask questions that help team members identify problems and issues, reflect on how to apply new knowledge and skills, work through conflict, decide on actions, and evaluate strategies.
- Suggest reading material or other resources that might help the Fellows in their development
- Provide written feedback to Fellows on written reports and assignments in a timely fashion
- Accept feedback from Fellows to assure a successful relationship
- Participate in at least 2 EPHLI Mentoring Meetings or conference calls with EPHLI staff for evaluation and feedback

Responsibilities of the Fellows:

- Develop a Team contract with the fellows and mentor
- Share learning styles and personal goals
- Schedule and convene team meetings which include the mentor
- Fellow's will share responsibility for leading team meetings, scheduling the meeting, and submitting a written report to the Mentor after the meeting.
- Send Mentor written reports prior to due dates for feedback



EPHLI Team Charter

One of the most basic but often overlooked elements necessary for team success is a team charter. A team charter can bring much needed direction and clarity to a team. Team charters can help teams save time, avoid unnecessary diversion or conflict, reduce ambiguity, and aid productivity. Take some time with your teammates to draft a team charter. The form below is just a guide for your discussion. Once drafted, copy to each member of your team, your Mentor, and the EPHLI office through Nicole Kozma.

Ground Rules

Ground rules, or group norms, address expected behaviors. The ground rules act as a code of conduct for team members and provide a basic structure for conducting effective teamwork. What norms will your group adopt around the following areas?

Attendance: What are your expectations around attendance at meetings? What are acceptable reasons to miss a meeting? What will be done when a member does not participate?

Preparation and Participation: what are the expectations about meeting preparation, about being honest and open in sharing beliefs? About listening to diverse opinions? About contributing to the work of the group?

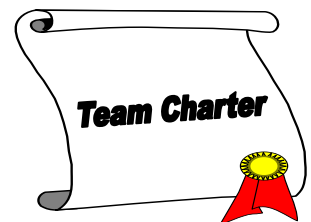
- Share learning styles and personal goals
- Agree on how often the Team will meet via telephone conference calls
- Rotate the responsibility for scheduling, convening, facilitating team meetings, completing a brief report and sharing it with the entire team and Mentor.
- Learn Action Learning and be an active action learning team member.

Conflict: How will you address conflict or differences of opinion?

Decision Making: How will decisions be made – consensus or majority rule?

Roles of the Mentor

- Clarify and model the action learning process
- Leadership Project Development
- Suggest reading material or other resources that might help the Fellow.
- Provide written feedback to Fellows on LP written reports and assignments in a timely fashion.
- Ask questions that help team members identify problems and issues, reflect on how to apply new knowledge and skills, work through conflict, decide on actions, and evaluate strategies.
- Individual Development Plan
- If requested, be available to facilitate discussions around each member's efforts at building particular leadership skills.



NAMES & SIGNATURES OF TEAM MEMBERS:

Your signature represents your commitment to your groups ground rules and roles.



ACTION LEARNING CONFERENCE CALL REPORT
Team Conference Call Number

Team Name: _____ **Call Facilitator:** _____

Date of Call: _____ **Present on the Call:** _____

Scholar # 1: Name _____

What ideas/questions raised were most helpful?

What actions do you plan to take before the next meeting?

Scholar # 2: Name _____

What ideas/questions raised were most helpful?

What actions do you plan to take before the next meeting?

Scholar # 3: Name _____

What ideas/questions raised were most helpful?

What actions do you plan to take before the next meeting?

Scholar # 4: Name _____

What ideas/questions raised were most helpful?

What actions do you plan to take before the next meeting?

The Call Facilitator should please complete this form and return it to your Team Mentor and Nicole Kozma. Thank you

EPHLI Team Action Learning Meetings

Individual Team Members Should Prepare for meetings/conference calls in advance by:

1. Revisiting your ground rules, your team charter.
2. Opening your mind to the fact that this process will allow you and your colleagues to share ideas and meaning within the group, so that you all might discover insights, which are not attainable individually.
3. Reviewing helpful questions for checking in with your colleagues and to help prepare to be a productive team member for your colleagues benefit.
4. Planning your "airtime." Prepare what you will say to bring your colleagues up to date regarding your Leadership Project.

During Conference Calls Each Team Member will have 10-15 minutes airtime during which each should:

1. Describe your Leadership Project **Problem Statement**.
 - Describe what steps you have identified to address the problem.
 - What has been your progress since your last meeting?
 - What barriers have presented? Have you been able to overcome the barriers? If not, Why not?
 - Has your problem statement changed? (In size, scope, or significance).
2. Describe the **Actions Taken**
 - What have I/we done since the last meeting?
 - What actions are outstanding?
3. Describe the **Result/Observations of Actions Taken**
 - What is/are most pressing problems?
 - How was my plan or action received?
 - Did it differ from your expectations?
 - What are our proposed next Steps?
 - What do I need from this meeting?
4. **Listen and respond** to questions of colleagues.
5. Once the meeting/telephone conference call is complete each Fellow should identify.
 - What did I learn? (Aha's)
 - What next steps will I take before our next meeting?

Reflection: Team members should reflect on the discussions and bring up thoughts about:

- What have we learned about problem solving?
- What have we learned that can help others deal with complex problems?