

Get into the Action

By Jamie Notter

Action learning — a systemized “learning by doing” approach — yields results quickly and can make an interesting addition to the association educator’s arsenal.

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Even as the “classroom” has evolved to include both virtual and physical settings, educational programs are still based on the same elementary model: Bring people together and deliver information, instruction, and insight to the participants. When employers send staff to such sessions, they hope staff will then apply their new knowledge to the “real world” back at the office.

And if it is a well-designed program with relevant and practical content, chances are good that staff will apply the learning. But with limited training budgets and employees hard pressed to find time to attend training programs, organizations cannot waste money on programs that don’t deliver applicable results.

A method called action learning can be a powerful complement to classroom learning. It still occupies people’s time, and often part of the training budget, but it brings learning out of hypothetical case studies or flashy presentations and into the real situations, problems, and challenges people deal with in their work environments.

What is Action Learning?

The “father” of action learning, the late Professor Reginald Revans of the University of Salford in England, said that action learning is difficult to define, because it is essentially quite simple. In general, the term “action learning” refers to any conscious effort by a group to examine what they are doing, attempt to improve the way they do it, and assess the impact of their change after they are done. The third step (assessing the impact) then becomes the first step in another

iteration of the process; thus, action learning self-perpetuates, constantly building on its own results.

Rather than having an “authority” ladle out information to passive participants, in an action learning system, the learners themselves design and implement the change and, in the process, learn from what they’ve done. Consultants often facilitate the process and provide some input, but the learners themselves do most of the work. Action learning occurs in real time. It is not a simulation, and it is not a case study. Learning is instantly and continuously applied.

Action learning exists in many different forms in today’s workplace. Project evaluation and performance-assessment systems clearly employ an action learning structure. For example, annual performance reviews (those focused on employee and organization development and not merely merit raises) typically involve employee and supervisor examining the employee’s past behavior and identifying areas for improvement. At the next scheduled meeting, they specifically examine how behavior changed and the impact of that change on business results.

Action learning also has affected how traditional classroom training is conducted. For example, problem-based learning (PBL) is becoming popular in college and university courses — not to mention the education offerings of associations. Instead of providing a theoretical framework or knowledge overview that students then apply to a problem, PBL starts by giving students a real-world problem to solve. The instructor serves more as a group facilitator, letting the groups solve the problem themselves and then drawing out the learning after the group is finished. As in action learning, students engaged in PBL integrate the learning into their practice in real time.

Action Learning in Action

The three following examples demonstrate the applicability of action learning. These are stories of actual organizations (an association, a nonprofit service provider, and a small restaurant) that accomplished team building, program evaluation, and everyday problem solving through action learning processes.

Team building. The president of the Electrical Contracting Foundation (a foundation associated with the National Electrical Contractors Association) used an action learning project to promote team building in his staff of four. After a series of individual interviews and group discussions, the focus of the project was narrowed to several specific issues to enhance and more clearly define team performance, namely decision making, roles and responsibilities, authority, and the assumptions behind all of these themes. The action learning process began with a review of how the staff functioned as a team during a foundation national meeting that had taken place about one month earlier. They examined how they made decisions, how they shared responsibility, and, particularly, how they set goals.

Although the major goals of the meeting were obvious to everyone, there were some second-order goals known by the senior staff but not the junior staff. For example, the explicit goal of the meeting was to review grant proposals, but the junior staff did not realize it also was an opportunity to explore fundraising opportunities with key potential donors. Realizing that they were missing important opportunities, the team decided to approach their next meeting differently.

The next meeting, the association's annual convention, would present a challenge. Already an important meeting for the foundation, this convention was particularly important, as it marked the association's 100th anniversary. That meant more people, more visibility, and more work. It also happened to be scheduled in the months following September 11, 2001, so it required new levels of creativity and flexibility from everyone involved.

Prior to the convention, the team planned and set goals in a new way. Previously, they all did their planning independently. Each person was prepared for his or her own particular area and shared information across functions only when absolutely necessary. For this meeting, however, staff discussed all of their areas together, bouncing ideas off of each other and solving problems ahead of time as a group. "We had done preplanning in the past but not all together like that. We were able to see not just our own roles and responsibilities but everyone's," says Bitu Jahangosha, a member of the foundation staff.

The staff reported the centennial meeting actually going “smoother” than usual, despite the increased complexity and importance of the meeting. “There was definitely less tension,” Russ Alessi, president of the foundation, reports. “And given that this was the centennial meeting, that means it was a real success,” he said. Through focused planning, they were able to make important changes, such as outsourcing the setup of their booth, which freed up time to do more important things during the meeting. They attributed their success in large part to the smooth preplanning process.

Upon returning from the convention, they also met as a team to review the results. They clearly saw the impact of changing the format of their preplanning. By creating a structure for cross-functional communication ahead of time, they became more nimble and effective during the meeting. “It was a real eye-opener,” Lynn Letourneau, foundation staff person, recalls. “You could see the ripple effects of how we interacted with each other at that premeeting across the board,” she said. By using the action learning process, they internalized and applied their learning quite naturally. They have since continued to maintain more open communication patterns while doing their work and have become more deliberate in “learning while doing.”

Evaluation. A more obvious application of action learning is in evaluation. Any organization that evaluates a program or activity is likely using action learning by making changes based on the program’s review. However, evaluation programs do not always rely on action learning. For example, some programs collect feedback on the value of the event (on a scale of one to five, please rate ...), yet the scores from these processes are often used to “prove” the value of an event rather than to make innovations that can be implemented and tested, as would happen in an action learning process.

Higher Achievement, a small nonprofit that helps underserved middle school students develop their academic skills, behaviors, and attitudes, effectively integrates evaluation and action learning. When new employees go through orientation, they learn of the fabled process known simply as “the debrief.” After any meeting, event, or public speaking engagement, they sit down as a staff and evaluate what happened. What worked? What really hooked the audience? What turned them off? Based on the debrief, they identify what they will do differently next time. The debrief is a normal, everyday part of how they do their work.

But action-learning-based evaluation does not stop there. The organization has invested significant amounts of time and money in a management information system that can support evaluation. Staff can use it to quickly and easily gather information about the performance of their students at any one of their four achievement centers, based on the specific results they are trying to deliver through their programs (such as grades, attendance, and test scores). The strength of the system allows them to apply action learning strategically.

For example, a report may show that males are experiencing better attendance than females. Based on this information, Higher Achievement can develop a program of “24-hour call backs” at one of its centers, where staff make phone calls within 24 hours to students who do not show up. At the end of a given period of time, the system can generate information — specific to that center — that will show them if, and how well, their program is working. If it is working, the organization can employ that solution systemwide. Reviewing and making changes is important, but if you do not have the ability to actually know whether the change has made a difference, the value of evaluating is lost. That third step in the action learning process is vital.

And when Higher Achievement can document results through system reports, funders are impressed. Imagine how an association’s members might respond. As Maureen Holla, executive director of Higher Achievement, says, “We use our management information system to inform us which strategies work and which don’t, so that we can better serve our scholars. Their success is our profit.” And if you think your association is too small to follow such a model, think again. Higher Achievement has a staff of 13 and an annual budget of less than \$1 million.

Everyday problem solving. Action learning is not limited to large-scale efforts. It can be applied to nearly any context. It just takes some discipline and attention to the three stages. An example of small-scale action learning comes from Bob’s Clam Hut, a small restaurant in Kittery, Maine. Its investment in involving staff in decision making has resulted in decreased turnover and increased profits. One such innovation is a simple process they developed called “thoughtful analysis.”

Thoughtful analysis is a process that staff and managers at the restaurant use to solve problems on an everyday basis. Following the pattern of action learning, it starts by gathering information about the problem at hand and analyzing as much “data” about the problem as they can quickly generate. The needs that emerge from the data result in staff brainstorming actions that might address the issues. After the new solutions are implemented, the group reviews what happened: How did it go? What changed? Are there new questions that need answering?

This simple process has helped staff at Bob’s Clam Hut solve important, although perhaps not glamorous, problems. For example, they used thoughtful analysis to address the relatively unexciting issue of comment cards. Like many establishments, the restaurant uses comment cards to get feedback from customers. Some staff members were frustrated, however, that the feedback was not being used effectively and that the process was more expensive than it needed to be, so they engaged in a thoughtful analysis about the topic. The results? With very little effort (mostly by staff, not leadership), the restaurant cut costs by more than \$6,000 and generated more useful reports from the information. They also have used the thoughtful analysis process on issues as small as regulating the flow of cooking oil and as large as providing recommendations regarding layoffs.

Injecting learning into the everyday business of making decisions changes both the process of decision making and the results. Using thoughtful analysis at Bob’s provoked general manager Shari Goupil to ask new, more powerful questions when making decisions. “Like going back to the question, ‘What do we value in a full-time employee?’” she said. “It forces you to consider more aspects, and we ended up with a different result.”

Action Learning and the Association Educator

The previous examples show the effectiveness of action learning in organizations. In each case, individuals and groups took responsibility for understanding better their own actions and making changes that generated observably better results. Action learning also is relevant to association educators. In addition to incorporating problem-based learning into educational programming, there are other potential ways to offer association members the opportunity to learn from their own actions.

For example, certification programs often augment classroom training and examinations with internships, practicums, or other programs that incorporate action learning. Moving beyond traditional approaches, association educators could explore linking education with volunteer opportunities. As members actually accomplish tasks in a volunteer capacity, they can simultaneously engage in an action learning process to learn from what they are doing. Association educators could even offer more customized programs where they go off site to actually facilitate action learning processes that meet the unique needs of individual members in the context of their own professional environments.

The opportunities are out there. Discovering them only requires application of a core action learning concept: trying new things. It goes back to the anonymous adage, “If you do what you always did, you get what you always got.” By incorporating action learning into their educational arsenals, association educators have yet another way to do things differently and get better results.

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