North West – Higher Education
Cross Institutional Action Learning

External Evaluation Report

Bev Agard Owen
Action Learning Academy
Project Background
Action Learning is an organisational development tool that empowers employees to resolve complex problems.

‘Action Learning is an approach to individual and organizational learning. Working in small groups known as “sets”, people tackle important organisational or social challenges and learn from their attempts to improve things’.

*(Pedler and Abbott, 2013, p5)*
Member institutions of the North West Staff Developers Network participated in the Aurora programme delivered by the Leadership Foundation and at a network meeting in March 2015, discussion of the programme resulted in all participants reporting that they had found the action learning component of the Aurora programme invaluable in terms of:

- developing relationships
- building leadership capability
- networking with those from other institutions
- broadening knowledge
- changing practice through exploring differing perspectives
- having the opportunity to engage in non-judgemental, confidential conversations with peers across the sector.
Member institutions of the North West Staff Developers Network participated in the Aurora programme delivered by the Leadership Foundation and at a network meeting in March 2015, discussion of the programme resulted in all participants reporting that they had found the action learning component of the Aurora programme invaluable in terms of:

- developing relationships
- building leadership capability
- networking with those from other institutions
- broadening knowledge
- changing practice through exploring differing perspectives
- having the opportunity to engage in non-judgemental, confidential conversations with peers across the sector.
Although network member institutions offer action learning to support leadership development, it was agreed that a “cross-institutional” opportunity would allow continuation of the benefits for Aurora alumni and open up the opportunity to others who have not participated in Aurora.

Additionally, the collaborative nature of the initiative would serve to strengthen the relationship of the North West regional network and other participating networks, and enable their respective organisations to:

- offer continued support initiated by the Leadership Foundation via Aurora
- enable the network to grow and learn together
- develop and disseminate an innovative way of supporting the development of female leaders and mixed gender groups
- enhance capability and capacity
- support the Athena Swan initially and Gender Equality Mark in due course.
Aims: To develop a methodology to enable a group of universities to deliver sustainable cross-institutional action learning to:

“enhance our networks and communities of practice to enable greater peer support and challenge which also create development opportunities that are bespoke for specific communities of learners”.

Objectives: To develop an approach to support a cross-institutional group of universities to:

- set up a cross-institutional action learning initiative supporting women and men
- adopt a project management approach to maximise the likelihood of embedding and sustainability
- evaluate the project to be able to demonstrate impact.
Achieved Outputs and Outcomes

**Outputs:** include the design and production of an interactive Good Practice Guide incorporating sections on: project managing; facilitating; evaluating and disseminating cross institutional action learning; an independent impact evaluation report and a range of presentations and publications.

**Outcomes:** growth of cross-institutional action learning as a method of supporting leadership development activities; a best practice approach for organisational/staff development groups, and the Leadership Foundation, to promote and build a sustainable method of professional peer support; he development of individual leadership capability, via sector peer groups, leading to capacity building within own organisations and development of the initiative to support male colleagues in the future.
Initial Internal Evaluation
Stage 1: Internal Evaluation

- The first action learning sets took place on 14\textsuperscript{th} October 2015.
- On 16\textsuperscript{th} November 2015 an on-line survey was sent to 42 attendees.
- 18\textsuperscript{th} December 2015 survey closing date, yielded 20 responses = 48%.

Participants stated that the principal reasons for joining the programme were:

- Expand personal development
- To get together with other female academics to share experiences.
Stage 1 – Internal Evaluation questions

? Group contained a good mix of members: 50% strongly agreed / 50% agreed

? Group cohesion from the first meeting: 35% strongly agreed / 65% agreed

? Group trust was quickly established: 50% strongly agreed / 45% agreed / 5% disagreed

? Group communication flowed freely: 55% strongly agreed / 40% agreed / 5% disagreed

? Opportunity to reflect on questions: 40% strongly agreed / 40% agreed / 20% disagreed

? Developed group working skills: 15.8% strongly agreed / 68.4% agreed / 15.8% disagreed

? Developed interpersonal skills: 10% strongly agreed / 60% agreed / 30% disagreed

? Enabled learning to take place: 45% strongly agreed / 55% agreed
After the first set participants commented on:

- the range of issues which people brought as problems
- went away with some specific action approaches to try
- helped to feel that the approach being planned was right, and gave new insights into what else would be useful / emphasised importance of aspects that had not been included

Summary: the programme is proving to be:

“helpful, interesting and potentially very useful.”
External Evaluation
The External Evaluation was conducted by Beverley Agard Owen, Director, of the Action Learning Academy Limited in conjunction with the School of Management at Swansea University.
On 2\textsuperscript{nd} June 2017 a face-to-face Evaluation session was conducted with the set members following the final action learning set of the programme. The participants were asked to express their opinions on the various elements of the programme and in addition, to share their “learning journey” visually and verbally.

On 15\textsuperscript{th} July 2016 an on-line survey was sent to the 42 original participants (\textit{academic and professional services staff}) with a separate survey addressed to the facilitators.

Taking into account annual summer holidays the response deadline was extended to 16\textsuperscript{th} September 2016, yielding 17 participant responses = 42\% and 7 facilitator responses = 77\%. This figure for participant responses is lower than the initial survey responses as was anticipate due to the number of participants who did not complete the programme.

During a 2-week period in September 2016 a total of 15 telephone interviews were conducted.
Participants Feedback
Common themes:
Participants “one word” feedback cloud

Positive
Insightful
Enjoyable
Useful
Satisfying
Transformational
Invigorating
Absorbing
Fantastic
Stimulating
Supportive
Excellent
External Evaluation Survey
1. **What motivated you to enrol on the action learning pilot programme?**
   - good experience of Action Learning on the Aurora programme
   - the concept of action learning as a method to help resolve issues
   - personal/professional skill development and an opportunity to meet women in other HEI roles.

2. **What were your expectations of the programme?**
   - gain other perspectives from outside of my current workplace
   - find the best way to solve my work issues
   - Time out of office to think about problems/issues

2.a **Were those expectations met?**
   - Yes
2.b What exceeded your expectations?
  support
  the process was far more effective than I anticipated
  the model used
  group commitment

4. Ways in which the programme has enabled you to improve/develop?
  listening skills
  problem solving skills
  developing prompting questions
  learning from others
  increased my self confidence in my own worth
  take time to think though management strategies now
  more likely to seek out others to assist with issues rather than struggle alone
External Evaluation Participant Questions

Work related confidence levels:

Before:

- Level 10: 0 (0%)
- Level 9: 1 (5.9%)
- Level 8: 5 (29.4%)
- Level 7: 3 (17.6%)
- Level 6: 3 (17.6%)
- Level 5: 2 (11.8%)
- Level 4: 3 (17.6%)
- Level 3: 0 (0%)
- Level 2: 0 (0%)
- Level 1: 0 (0%)

After:

- Level 10: 1 (5.9%)
- Level 9: 2 (11.8%)
- Level 8: 4 (23.5%)
- Level 7: 4 (23.5%)
- Level 6: 2 (11.8%)
- Level 5: 1 (5.9%)
- Level 4: 0 (0%)
- Level 3: 0 (0%)
- Level 2: 0 (0%)
- Level 1: 0 (0%)
4. To what extent can changes you have made be attributed to the programme?
4. How has the programme influenced the way you see things/the way you act and/or your behaviour?

deal with problems in a logical way and seeing problems from someone else's perspective
no alone in dealing with challenges in HE
...very task focussed and now try to be more people focussed
think about planning change better and more consideration of communication
now try and take an objective view of a situation, not rush in with a rash decision and quick response
help others find their own solutions to their issues
8 Examples of how or will in the future, apply some of the learning at work?

Use questions rather than providing opinions
arrange regular meetings with line manager and be clearer on future goals
when faced with a problem, take a step back and review the options, rather than knee-jerk reaction
think of how others might see the same situation differently
use question technique in coaching situations

“I have a new team and I plan to use ALS when working with my senior team both at peer level and the one I manage to help everyone feel more involved and more self motivated”.
To what extent has participation in this programme has enabled you to effect positive change?

- Strongly Agree: 4 (23.5%)
- Agree: 10 (58.8%)
- Neither agree nor disagree: 3 (17.6%)
- Disagree: 0
- Strongly disagree: 0
11. Who specifically would be the benefit from this programme

Anyone who's performance is affected by confidence and conflict
academic staff
line managers
professional services support staff
supervisors
team leaders
new managers

“everyone”!
Programme exceeded expectations:

12 – Definite Yes including...
   “for some of the academic staff, it was life changing as they
dealt with person and management issues (management by others of
them)”

3 – Complimentary

1 – Unable to attend – family illness

1 – Negative - I was one of the most experienced in the group and I struggled to
   present challenges that were useful for discussion
Participants Learning Journeys

Action learning,

- Understanding the concept of action learning and seeing how it is put into practice.
- Being part of an Action learning session where you bring a issue/problem, and the skills you need to resolve.
- Using the ethos of action learning with the team at work, further develop the skill of action learning whilst supporting the team members.
- Results from issue/problem raised being positively received and shared with others.
- Understanding that thinking, networking, discussing true away from office brings benefits.
- Team Working
Participants Learning Journeys

Graph to show the benefits of each session:

1. Introduction to AL - Rules/guidelines useful
2. Intro to group - Very positive
3. Sharing my problem - Some probing questions led to me questioning what my problem actually was!
4. Missed this session!
5. Overall experience - Extremely positive - would feel confident in sharing knowledge of ALS to my institution
Facilitators Feedback
Facilitator “one word” feedback cloud

Collaborative
Rewarding
Enlightening
Proud
Interesting
enriching
2. The top 6 essential qualities or behaviours a facilitator needs:

- Good listener: 5 (13.5%)
- Think quickly and logically: 1 (2.7%)
- Excellent communicator: 4 (10.8%)
- Build trust among the set: 6 (16.2%)
- Prepare in advance: 1 (2.7%)
- Distribute agendas for set meetings: 0
- Ensure group understanding of issues: 3 (8.1%)
- Include all engage in discussions: 2 (5.4%)
- Re-focus the group on a particular agenda item: 2 (5.4%)
- Establish ground rules: 5 (13.5%)
- Manage disruptive behaviour: 4 (10.8%)
- Value people and their ideas: 3 (8.1%)
- Ensure action notes recorded: 1 (2.7%)
- Assign follow-up actions: 0
3. **What could you improve?**

- Getting the groups to explore/question the issue in more depth, so as to raise the awareness of the 'problem holder'. Rather than focusing on more solution-focused questions.
- Being more assertive when they start to give advice rather than ask questions.
- To be more engaged in the administration of the sets because I felt that there were opportunities to re-establish the value of the set to discourage some of the set members dropping out.
- Observing behaviours without evaluating.
- Managing disruptive members.
- Setting ground rules to build trust and shared understanding.
5. Open ended questions to encourage discussion?

It is not true action learning if we do not use the appropriate types of questions and often human nature means we revert to fact finding or advice giving. There is little individual value in this to the issue bringer. However, I do have to state that I made it clear to the group that if someone had a link, piece of advice or a contact that could positively impact on the issue bringer then they could ask permission to share that after the set had ended with the individual concerned.

Group members tended to use a hybrid approach to their use of questions.
6. Move the group around physically move to maintain or heighten energy levels?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Almost always</td>
<td>1</td>
<td>14.3%</td>
</tr>
<tr>
<td>Often</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Sometimes</td>
<td>1</td>
<td>14.3%</td>
</tr>
<tr>
<td>Seldom</td>
<td>2</td>
<td>28.6%</td>
</tr>
<tr>
<td>Never</td>
<td>3</td>
<td>42.9%</td>
</tr>
</tbody>
</table>

This has to be done when the facilitator thinks it's appropriate - needs professional judgement.

Comfort breaks were negotiated with the group.
Impromptu unscheduled breaks?
10  Facilitation techniques used and details of other methods recommended

<table>
<thead>
<tr>
<th>post-it method</th>
</tr>
</thead>
<tbody>
<tr>
<td>The post-it note way of providing questions to the issue bringer was invaluable to ensure that they could go home and reflect between sessions, even if the questions weren’t answered in the set, and do further work on their issue.</td>
</tr>
</tbody>
</table>

| Listening, reflecting, reframing, challenging, clarifying, summarising. |

<table>
<thead>
<tr>
<th>very informal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used the post-it method. The set decided to ask questions as they arose. I prefer a more structured approach to enable all to become involved but am led by the set.</td>
</tr>
</tbody>
</table>
11. Comments or recommendations relating to the method of facilitation?

I think the post-it method worked well - it kept the sessions focused & was easy for members to understand and follow quickly.

I'm not sure how the change of facilitator impacted on the sets, I would be interested to see their feedback.

I don't think the interchange of facilitators 'harmed' the group, if anything it meant they had to build the trust amongst themselves more. The post-it method was useful and I think once the first post-it questions were asked an opportunity for another round was useful so as to dig further into the issue.

Think more time could be spent on developing questioning skills of participants, or more time developing a shared understanding and agreement of the technique.

We had a pool of facilitators, some facilitated more than once with the same or a different set.
Comments or recommendations with regard to location, venues, catering etc.

I think it would have been better for 1 venue to host all sets for each meeting (i.e. not all meetings). Although, it was logistically easier for the sets to go to different venues, on occasion insufficient people turned up to enable the set to run.

I did feel that it would be a benefit if all sets were held at the same location then if people failed to turn up we could re-arrange sets if needed.

Venues need to be carefully selected and rooms in particular need to enhance the Action Learning set ethos. Agreed times for starting the sessions are also important because of travelling and organising your diary. Its a commitment as a set member to attend each session, there was a little apathy from some set members at times.

Some of my delegates would have preferred the sets to be located locally, however others enjoyed the trip out.

Catering is needed as people are travelling a long way in a lot of cases.

Suggest hold all sets at the same venue so that non attendance does not become too much of an issue.

Venues and catering arrangements were good to ensure a safe space and to minimise disruption to the group's focus on the individual presenting their issue.
Suggestions or improvements for future programmes.

All sets to be mixed (academic and Professional services) and the 1 location for each meeting.

Clear contracting at the start of the programme to outline the commitment to learning as an individual but participating in the wider group enhances the development of others and is equally as important.

Perhaps meeting more regularly so the momentum isn't lost.

Do not hold action learning meetings on known holiday dates.
Could consider facilitator staying with the same set throughout.

To stipulate groups are always a mix of women in academic and professional services roles.
External Evaluator
Summation
My involvement with action learning extends over 7 years during which period I have facilitated over 150 action learning sets including a pilot programme at Swansea University.

My training was conducted by Lancaster University in conjunction with the LEAD programme.

In my experience, the skill of the facilitator is vital to the success of the set in the initial period. During the progress of the set, I believe that the facilitator should “slowly withdraw”.

Not in the physical sense but almost sit on the edge of the group thereby allowing the group to self-facilitate which should empower the group to continue meeting on a regular basis following the close of the programme.
Factors that I believe have a positive impact on the effectiveness of Action Learning...

1. There is a school of thought that recommends the rotation of facilitators between groups. However, I feel that to introduce a new person into a set, can interfere with the dynamic of the group after they have built up a bond of trust amongst themselves. The survey feedback would appear to support this:

   “It would be quite helpful to keep the same facilitator for the whole process.”

   “Found the interchange difficult as we ended up showing them how we did things rather than developing skills with them as we went. They all also had very different styles.”
Factors that I believe have a positive impact on the effectiveness of Action Learning...

2. Feedback relating to set locations/venues/catering were in the main fairly positive. There were some remarks that sets were conducted in open plan areas and separate rooms would be preferable.

“Venues were a bit mixed - some were less private than others and privacy was important."

“... perhaps could be more geared to individual group member location... individual groups could decide locations independently”.

“Locations linked to group members travel wise.”

Pedler and Abbott (2013) talk about the accoucheur role in creating the right conditions for action learning to work well.
External Evaluator Summation

Factors that I believe have a positive impact on the effectiveness of Action Learning...

3. Set composition: Set members should be selected on their willingness to give and to receive. If an individual who feels they have nothing to learn from the set, they could create a negative atmosphere.
   “Try not to mix people from same HEI in same group.”

4. Timings: Some issues were experienced with set timings thereby affecting attendance levels. “Timings were not consistent with parenting and school breaks.”
   “Clear timings and perhaps half an hour at the beginning or the end for staff to chat and share a bit more.”
   “Locations linked to group members travel wise.”
The North West Higher Education Cross Institutional Action Learning Programme is a major success and the project team deserve the highest praise for their dedication and determination for the delivery of a success pilot programme.

The participants comments show their overwhelming support this initiative:

“An insightful and inspiring programme.”

“My participation in the action learning set has given me problem-solving skills that have reduced the stress of the workplace. It was also a lot of fun meeting like-minded women.”

“Excellent programme, very supportive, a good opportunity to network and empower women to make changes”.

“This was a much welcomed and positive experience. Action Learning proved to be a gentle but very powerful tool which helped me in both my personal and professional development and through which I made new strong friendships.”
Finally, on a personal note, I would like to say that I appreciate the manner in which I have been welcomed into the project team and am delighted to be part of this programme which will develop further and spearhead changes in Higher Education.

This programme has demonstrated that the challenges faced by those in Higher Education are not unique, however responding to those challenges will be unique to each one of us individually.

Action learning that originated with Reginald Revan’s work has the potential to change both organisations and participants for good. Long may it continue!
“Your beliefs become your thoughts,
Your thoughts become your words,
Your words become your actions,
Your actions become your habits,
Your habits become your values,
Your values become...your destiny.”

Mahatma Gandhi
Bev Agard Owen
Action Learning Academy
M 07860 438548

Swansea University
School of Management
T 01792 606703