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<https://orcid.org/0000-0001-8178-1141> (2016) How a small family run business adopted Critical Reflection Action Learning using hand drawn images to initiate organisational change. *Action Learning: Research and Practice*, 13 (1). pp. 69-78.

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<http://dx.doi.org/10.1080/14767333.2015.1130348>

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ACCOUNT OF PRACTICE

How a small family run business adopted Critical Reflection Action Learning using hand drawn images to initiate organisational change.

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In this account of practice I would like to share my experiences of facilitating a Critical Reflection Action Learning (CRAL) set with a small family run business, struggling to make change and expand their services due to the problems they encountered in separating their business lives from their family lives. The account I present here is based on a 12 session project I carried out with the organisation using a CRAL methodology as part of my Doctoral studies at the University of Hull Business School (Shepherd, 2011). In this particular Action Learning project participants were invited to create hand drawn images which acted as representations of the problems they faced as a business. The images were used by set members in reflective conversations on the problems they were having. Each set member cycled through a process of drawing an image and reflecting upon its meaning using individual, group and critical reflection. The whole process enabled set members to gain new insights into their problems and provided them with the opportunity to devise new, more effective ways of tackling their problems and understanding the power dynamics underpinning them.

Keywords: critical reflection action learning, visual images, facilitation, SME, family run business

Introduction

In this account of practice I aim to describe the way in which I facilitated a small family run business to utilise CRAL in order to help them initiate change within their organisation. The methods used in this project were different to a traditional Action Learning set in three main ways; firstly the set used their own hand drawn images to generate data about the problems they were reflecting upon. Secondly the set reflected upon their images using a number of different styles of reflection and lastly the set were guided throughout the process by my facilitation efforts which were directive in their application.

As a result of the differences in this approach, my account of practice may seem unconventional in a number of ways. My description of the CRAL set is often quite intimate, as it brings to the fore the group dynamics within the family business as they attempt to negotiate their roles and the power structures which underpin them. This account of practice is also a little unusual as it discusses the metaphors and fantasy surfaced by set participants as they attempted to reflect upon their images whilst trying to understand their underlying content. The account also demonstrates my efforts to facilitate the group in a constructive way whilst trying to develop my own sense of the underlying organisational dynamics which again, may be different to more traditional set facilitation methods.

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Critical Reflection Action Learning

Within the field of Action Learning Marsick and O'Neil (1999) identify three 'schools' based on three different theoretical approaches to Action Learning. The first school is known as the Scientific school and is based upon Revan's original ideas. The second, the Experiential school is largely defined by researchers who adopt Kolb's experiential learning cycle (1984) in their sets. Finally the Critical Reflection school proposes that researchers explore their participants 'taken for granted' assumptions about the organisation and the roots of organisational power (Rigg & Trehan, 2004). CRAL in practice utilises an approach to the reflective technique which questions and challenges established power and control relationships.

The application of critical theory is designed to 'help the action learner stand outside the prevailing social or organisational situation in order to see how it could be different and changed for the better' (Pedler, 2005, 3).

I first encountered the notion of CRAL whilst undertaking a Masters of Research (MRes.) degree at the University of Hull Business School in 2007. One particular module explored how researchers could gather data in 'non-traditional' ways by encouraging participants to create hand drawn images of their organisational issues which could then be used as a tool of both traditional and critical reflection. I was fortunate enough to be taught this particular module by Professor Russ Vince who had been exploring CRAL, drawn images and emotion for some time (Vince & Broussine, 1996; Vince, 2001; Vince & Warren, 2012). Intrigued, I decided to see for myself how drawings could be used to gather data in a small Action Learning set in my MRes. dissertation (supervised by Professor Vince).

My interest in using hand drawn images to generate data sprung from my intuition that the approach held within it the ability to uncover attitudes, emotions and assumptions which resided at the extreme limits of awareness and which could be accessed through drawings. The more I worked with drawings in group settings, the more I saw this taking place as set members engaged in creative acts of sense-making and problem solving.

Upon completion of the MRes. degree and after validating the methods utility in my mind, I went on to apply the drawing approach in my Doctoral studies which again was supervised (in part) by Professor Vince. In my PhD. research I further developed the drawing methodology within a CRAL framework with two very different Small to Medium Sized Enterprises (SMEs). This account of practice describes the project I carried out with one of the SMEs and aims to offer guidance to other practitioners who may wish to use similar methods in their own CRAL sets.

Facilitation

It was clear to me from my experiences of carrying out a number of CRAL sessions with SMEs that this particular methodology required the development of some quite directive facilitation skills. I understood that facilitators within traditional Action Learning sets were mostly non-directive and encouraged high levels of autonomy; often the stated aims of set facilitators would be for the set to become self-managing. The way in which my facilitation differed from regular Action Learning facilitation was in how the reflective process itself was managed, which was more reminiscent of other CRAL practitioners who seemed to be more directive, engaging and collegiate in their approach (Brook & Aspinwall, 2013).

For my research projects I devised a three-step facilitation technique which required each set member to engage with a number of reflective conversations aimed at helping them surface different aspects of the problem they were tackling. In the first step I encouraged the set member to engage with individual reflection (Schon, 1983). In the next step I invited the rest of the set to ask questions about the image, to give their impressions of what the image represented to them and to offer different interpretations of the image to the artist (Reynolds & Vince, 2004). The final stage which was often the most difficult was to facilitate a critically reflective conversation of the problem with the whole of the set (Reynolds, 1998).

In the critical process I invited the set to consider their drawings and the underlying problem in a wider context and 'wondered out loud' if there were other ways to understand the problem considering issues such as the power and control dynamics in operation within the organisation. I also encouraged critical reflection on issues connected to the privileged position of some members of the organisation and notions of professional identity in terms of the way in which set members experienced themselves in relation to their work roles.

After all set members had undergone this process and in the final stages of the set (a set usually lasted around an hour) I would invite set members to describe how the session had helped them understand the problem differently and ask them what action they would take on the problem in the coming week(s). Often set members would state that they needed more time to think about the problem and pledged to spend the following week engaged in more individual reflection, discussing the problem with other staff members or implementing small changes to their work routines.

The approach did initiate organisational action and a great deal of organisational change but set members seemed to solve their problems in a non-linear fashion. The problems set members worked and reflected upon seemed to be composed of a number of narrative 'strands', all of which needed teasing out and exploring before the problem itself could be properly addressed and the correct action implemented.

The drawing method

I began each session by asking the set to come up with an organisational problem they all shared and would like to reflect upon in order to change or solve. After the group conferred, I gave each person a black felt-tipped pen and the group one sheet of white A1 sized paper. I then requested the group to draw their interpretation of the problem on the paper. At the end of this exercise the set had created four different hand drawn images which represented their interpretation of the problem, on the large sheet of A1 paper.

Introducing Barleyfieldsⁱ

Barleyfields is a small, family-run provider of mental health support services in the North of England. It was established around 10 years ago by Brian and Gillⁱⁱ, a married couple who had previously worked as mental health nurses in the National Health Service (NHS). Barleyfields was formed by the couple after retiring from the NHS and in response to an invitation to tender for mental health support services by their Local Authority. The team is made up of seven staff members who all have experience in mental health nursing, support work or social work.

Barleyfields provides support services for a number of psychiatric patients living in the local community who are in need of additional help with their day-to-day tasks such as shopping, taking medication, managing their money, paying bills and attending GP appointments. All

members of staff state that they find the work both extremely rewarding and often extremely intensive due to the changing mental health of their client group. Most of Barleyfield's client group go through long phases of mental stability when they rely on the team to support them with simple, ongoing daily tasks. This situation does not last long, as many clients experience acute periods of mental ill health. Some clients become deeply depressed, some experience periods of psychosis and other clients act out risk-taking or reckless behaviour with little awareness of the consequences.

Organisations such as Barleyfields working with such a fragile client group need to be internally robust and employ staff with a wide range of skills and personal qualities. Best practice in this sector is for the organisation and its staff to engage in regular supervision sessions, reflective practices and organisational learning activities within a Community of Practice.

Barleyfields became involved in my CRAL project after they expressed an interest to a colleague of mine in using Action Learning to help them work through some of their organisational problems. The problems the team were experiencing included issues with communication where staff failed to 'hand over' information to their colleagues resulting in other members of staff duplicating their efforts at one extreme and 'fire fight' when missed procedures caused operational problems at the other.

Members of staff also reported that they were often unclear about their own and other staff members job roles, which affected the allocation of work and caused a range of problems when it came to working with individual clients. The chaos experienced within the client group as they became mentally unwell seemed often to be replicated (metaphorically) at times of high anxiety within the Barleyfields staff team.

Senior staff members also reported their frustration that the overall operation of the business was not 'smooth' but often 'chaotic'. This was beginning to affect both team morale and the aspirations of senior staff who were reluctant to tender for more work (which from a purely technical staffing perspective they should have been able to do) but which they felt unable to offer given the present organisational confusion.

I began working with Barleyfields in 2009 as part of my PhD research project. Set members agreed to meet with me every fortnight for 12 sessions using the CRAL methodology I described earlier. The Barleyfields CRAL set comprised of four participants, three of whom were family members; husband Brian (Managing Director (MD)), wife Gill (administration), daughter Fran (support worker manager) and Nikki (support worker).

Initial Observations

My initial observations of the team were that they were a friendly, engaging and democratic group who were struggling to make changes and seemed quite puzzled as to why the changes they needed to make seemed so difficult. Brian, the MD was jovial and hardworking, who seemed keen to push the organisation to grow and prosper. Originally Brian and his wife Gill had started the business with a 'can do' attitude which was still evident. Gill seemed a little more reserved than her husband and came across as anxious. Gill was quietly spoken and seemed less confident, however, her aspirations for the business matched that of Brian.

Fran was the couple's daughter and managed the four support workers who had regular contact with the client group. Fran had just completed her social work degree and seemed to

have lots of ideas of how Barleyfields could grow. Fran was very friendly and articulate and quite opinionated with some of her ideas. Making up the fourth member of the set was Nikki, an unrelated member of staff who worked under Fran as a support worker. Nikki seemed quiet, shy and cooperative as well as being a very able member of the Barleyfields team.

As we began to work together within the set I was surprised to discover the level of passion emanating from the group as they worked on their problems through the drawings. Often the set became immensely supportive of one another with each member contributing to the reflective process and surfacing some important insights. At other times the set seemed to display the opposite traits, as disagreements and confrontations would arise which were wholly unreflective but which I felt were closely tied to both the business and the underlying dynamics within the family itself.

Over the lifetime of the project I witnessed some pretty difficult confrontations in the set as it seemed that a number of unsaid or hidden attitudes were slowly being brought out into the open.

As the group facilitator I felt a responsibility to ensure the set reflections were constructive, honest and critical. If reflective conversations on the drawn images became too extreme I would point out to the group that the reflection was becoming too personal, that set members were becoming defensive and that little real organisational learning could be derived from such personal 'digs'. This is an example of one unproductive comment by Fran.

I think the dynamic that played out last week is something that [often] happens, I think that Brian has a fear of being controlled, so if I suggest something that's different he immediately interprets that as me trying to be "one up", be bossy, or be controlling.....

At other times the group's reflections seemed to be totally constructive and appropriate even though they critically questioned the organisation or the way systems operated. This type of reflection felt different to me, in that it engaged everyone in the set to discuss the issue and generated some real excitement within the group at the prospect of change coming from the discussion.

In the sections which follow, I will try to give a flavour of some of the events which initiated change and describe the ways in which set members were impacted by the drawing/reflection process.

Becoming more skilled in reflection and accessing emotion

As time went on and set members became more proficient in the three-step reflective process they began to reflect more deeply on their images. This skill often seemed to make conceptualisation of the larger organisational issues easier to understand in some ways, as if the images helped tie concepts and ideas together easier.

That [the drawing and its interpretation] really made me think about my struggle and I think it's time to give up the struggle of trying to be something were not, I think there's something about that gap, some resistance in us and [we should] just say 'this is how it is'.

Sometimes the images and reflections left 'imprints' on set members who reported a change in their emotions between sets. Some members seemed to be willing to allow the images to have an impact on them as a way of engaging with their problem solving attempts at a deeper level. The two examples following from Gill illustrate this.

I was really stirred up last week and I couldn't sleep Tuesday night, I was tossing and turning and got up in the middle of the night, I think what you said to Brian last week when he described his "moving the black cloud" in his drawing and you said "why don't you move yourself?" I found that really quite profound.

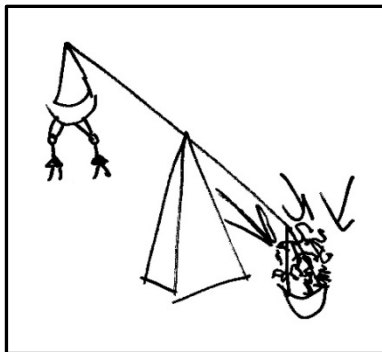
In this example Gill reports on the realisation originally surfaced the session before that she is responsible for a problem the set discussed.

Well I've just got a really thick black place in my chest that I can feel, 'cos [sic] I know that we're not doing the [more important] stuff

Power and control issues

One of the most significant things the group realised and one which initiated major changes at Barleyfields was the amount the power and control Brian exerted within the business. For years it seemed that Brian had been 'allowed' to control almost all aspects of the organisation, even though he had steadfastly maintained that everyone had an equal right to become more involved and make changes. In my mind it seemed quite obvious that within a family business the most dominant member and the co-founder of Barleyfields would clearly exert most of the power and control.

I think the business failed to notice the situation for a number of reasons including 1. the team were almost always too busy to stop and think about the 'bigger picture', especially when clients became mentally unwell 2. Brian's energetic and enthusiastic involvement was often allowed and even encouraged by other staff members who were often busy with clients 3. the boundaries between family life and business life were blurred. Brian and Gill would often replicate their family situation within the Barleyfields structure.



I don't feel like I've got all the power I think we've all got quite different roles within the business and I think were able to move within those roles and I don't think there's anything that I would ask Nikki to do that I wouldn't do, I feel proud of what I've created at the beginning but I couldn't be where I am now without Gill, Nikki and Fran.

In this short extract below, Brian begins to realise how his exertion of power alters the organisational dynamic between him and Gill.

I think we need to recap on last week, you know, because for me it was never an issue until it came into my awareness last week about boundary stuff between Gill and I...

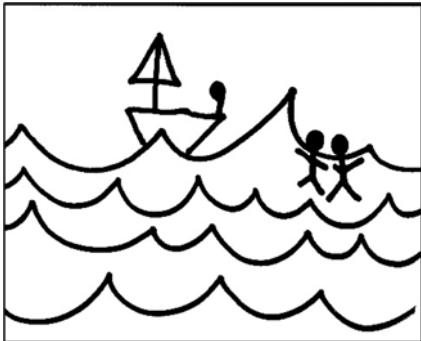
In this extract set members use critically reflective conversations about how Brian's way of working seems to exclude others whilst framing the business in competitive terms.

There's more dynamics going on than were giving ourselves credit for... I think I hold a lot of anxiety for Brian when he starts a new project..... I wish that he would let me lead, I wish you'd be more open to new ideas and to new ways of thinking and not be too rigid about

that...everything's about competition though Brian. It's not about one person being more powerful than the other it's about working together to be more affective

Using metaphor as part of the reflective process

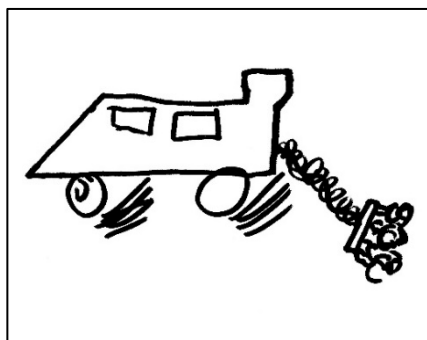
Sometimes set members would draw their organisational problems as metaphors. These images tended to contain a range of ideas about the problem and the underlying emotion which accompanied it. It was always very useful when a set member produced a metaphorical image as I found that reflection on the metaphor allowed the set to surface a richer reflective conversation, often questioning the way they felt and interacted with the problem and the impact this had on them.



From where I'm looking it just seems like two people have missed the boat, there's been a chance, but they've missed it and in a way that seems like where I am.....the boat that we're actually signed up to is sailing past us and we're still in the water and were trying to get on board; or if we are trying to get on board there's some resistance to it, but in the meantime were left struggling, floundering, it's all become too much really.



...the only image I've got is under the sea, this is the seabed and there's some plants and you know how the sunlight comes down onto the sea and there's patches of light and illumination, it reminds me of snorkelling...down at the bottom its more sinister, there might be a rocky outcrop and a bit of shadow over there. [I am] comfortable in it and I could spend all my time in it...



B-...that's supposed to be a Ferrari and there's a chain at the back with all of these weights on, that's kind of holding me back and I don't know really where all those weights and chains are coming from..... I want to go and put my foot down, you know but there's something kind of holding me back

F- When you say that you're a car that raised the question to me "where do we sit in it?"

B- I'm not the car, the business is the car that's flying ahead, it's not me

F- OK

G- Are we the chains then? (looking serious)

F- I thought about that too (looking serious)

B- No I just feel that something's holding me back from moving forwards

The absence of a set member

After the third session Fran had a period of illness and was absent for six sessions. Although Barleyfields felt the impact of Fran's absence in a negative way with an increase in their workload, the set seemed to use her absence more positively in their reflective sessions.

Fran's absence generated issues on absenteeism, workload and professional identity which all helped the set to gain a wider perspective of the business and their roles within it.

At one point a critically reflective conversation surfaced the notion that Fran had more privilege than others and could take time off with impunity. The week after this a set member reported that Fran felt quite the opposite. This revelation was critical for the set as they began to realise the need to separate out their family from their business lives and spread power and control more equitably.

Her perception is that she doesn't have power and privilege because she is a family member, whereas our perception is that she did have power and she did have privilege..... In a way it feels a little ironic that the person that is having the issue with being absent is a family member and not an ordinary member of staff.

Over the remaining sessions the group began to tackle some of their deeper problems. Fran returned to the set for the final three sessions and the group reviewed a number of the procedures which Brian previously controlled. Brian was actually very willing to relinquish the power he held and in some ways I am sure that he was quite relieved that he could share more responsibility with other staff members.

Barleyfields began to feel less 'chaotic' and more boundaried in terms of the separation between the family and the business itself. This comment from Fran demonstrates the work both Brian and Gill put in to creating boundaries and the positive impact this was having.

From the last time I was in the group [compared to] last week, I noticed a big difference in Brian and Gill.... it seems like they're owning the faults and willing to change which is having a big effect on the group dynamic..... I wish I could have been there a bit more but I do feel I've taken something away from it.

As the work ended I took the opportunity to ask set members what benefits they felt they had derived from using the CRAL approach to problem solving at Barleyfields.

I think there's been a shift...a big decision and a shift. We're not in that battle anymore, I don't know what [happened in the process] but we're not there anymore... I think the needs of the client group are far simpler than we thought, and we have changed our [service delivery] provision to reflect this.

These are Brian's final comments at the end of the project.

I think we've defined our roles better and I'm quite happy for Gill to take a lead on some things and for me to take a lead on other things. I'm glad you've recognised that change in me Gill. It seems to be working for the business and it seems to be working for me too.

Conclusion

This project demonstrates how Critical Reflection Action Learning using drawn images may be useful to organisations in both their reflective efforts and change initiatives. Researchers may find this approach most useful when working with organisations experiencing problems connected to issues arising from power, control, autonomy and leadership.

This type of CRAL can often be an intense experience for set members trying to understand their organisations whilst negotiating different ways of working. To work best, set members

need to 'buy into', understand and then choose to be part of a process which has the power to expose the individual and organisation to close scrutiny. On reflection I think that this is one of the great strengths of the method, although to some organisations who may feel the need to be a little more guarded to this level of honesty, the results of such an approach would be less appreciated and I imagine, less successful.

ⁱ Pseudonym

ⁱⁱ Pseudonyms

Notes on Contributor

Gary Shepherd is a Lecturer working in the Faculty of Education and Theology at York St. John University. His research interests include the management of anger within families and the reflective practices of teams working with young 'care leavers'.

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