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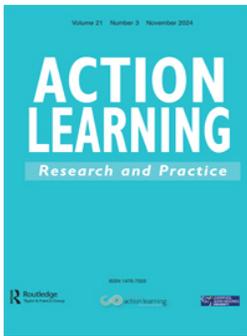
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## Twenty years of action learning in the journal *Action Learning: Research and Practice*

George Boak

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## Twenty years of action learning in the journal *Action Learning: Research and Practice*

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### ABSTRACT

This paper provides a thematic analysis of research papers published in *Action Learning: Research and Practice* over the past 20 years. The analysis concentrates on the different contexts in which action learning has taken place and on the variations of action learning that have been presented in different papers. Contexts discussed in this paper are different international settings for action learning, and the use of action learning in healthcare, for social action, for small and medium-sized enterprises, and in higher education. Variations and developments of action learning are critical action learning, virtual action learning, and action learning research.

### KEYWORDS

International action learning; critical action learning; virtual action learning; action learning research

## Introduction

This paper looks back at 20 years of papers published in *Action Learning: Research and Practice* by way of a thematic analysis of the different settings in which action learning has taken place and the variations in action learning that have been explored in the journal.

The editorial in the first issue of this journal in 2004 set out its intended purpose:

Action learning is growing in new directions in many parts of the world, and we welcome to this new journal all those who are contributing to these developments as participants, sponsors, facilitators or researchers. We intend *Action Learning: Research and Practice* to become a main platform for the sharing of ideas and practice within this growing international community. (Editorial 2004, 3)

Since then, over the past 20 years, the editors, the editorial board members, and other contributors and friends have worked to extend that welcome and to build and maintain the platform.

This is not the only journal to feature research on action learning: Cho and Egan's (2009) systematic review of empirical studies into action learning from 2000 to 2007 found five other leading academic journals publishing research in this area –

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*Management Learning, The Learning Organization, Journal of Workplace Learning, Journal of European Industrial Training, and Advances in Developing Human Resources*. However, their follow up review of papers published 2008–2020 (Cho and Egan 2023, 384) found that there was a higher concentration of papers in that later period in *Action Learning: Research and Practice* and stated ‘it seems reasonable to preliminarily conclude that ALRP has become a *go-to journal* for a substantial number of action learning researchers’.

For the first three years ALRP was published twice a year and thereafter three times a year. Since the first issue in 2004, there have been 58 issues (not counting this one). Download numbers have grown steadily over the past few years, and in 2023 were a little over 57,000. As regular readers will know, the journal publishes two types of research paper – refereed papers, which are assessed through double-blind peer review, and accounts of practice (AoPs), which are assessed by a panel of AoP editors. Since 2004, 211 refereed papers, six invited essays, and 195 AoPs have appeared in the journal.

The specific focus of the journal, on action learning, is narrower than more general learning and development, or work-based learning, or experiential learning, but this review of past papers shows that within this focus members of the action learning community have engaged with a rich variety of settings and issues. Park et al. (2013) conducted a systematic review of papers published in ALRP 2004–2012 and found action learning was being practised in a range of national and sectoral contexts and for a number of different purposes. A theme that permeates the papers published since 2004 – sometimes made explicit, sometimes implicit – is the adaptability of action learning to different contexts and challenges. A seminal paper that pre-dates the first issue of ALRP proposed a typology of different approaches to action learning (Marsick and O’Neil 1999), and in the second volume of this journal Pedler, Burgoyne, and Brook (2005) identified changes, developments and varieties in action learning practices. A special edition of the journal focused on adaptations and evolutions of action learning (Brook, Lawless, and Sanyal 2021).

## Themes

The remainder of this paper discusses a number of themes found in the papers published in the journal over the past 20 years, concerning contexts in which action learning is practised and variations that have developed. Thematic analysis was carried out, beginning with a review of the title of each paper, then the abstract, and then – where appropriate – the whole text. The number of papers that demonstrated each theme are provided to indicate its prevalence, but numerical frequency is not intended to indicate a theme’s importance (cf Braun and Clarke 2022, 182).

The themes discussed are:

- Action learning in international contexts
- Action learning in healthcare
- Social action and action learning
- Small and medium-sized enterprises and action learning
- Action learning in higher education
- Critical action learning
- Virtual action learning
- Action learning research

### International action learning

Action learning was first developed in the UK, and Park et al.'s (2013) review found the majority of published papers at that time were UK cases. However, Revans, the originator of action learning, undertook international projects in Belgium, Egypt and India (Revans 1980) and Edmonstone (2019, 223) notes that, in 2019, action learning is 'used in at least over seventy member countries of the United Nations in Europe, Asia, the Middle East, North, Central and South America, Africa and the Pacific'.

Looking back over the papers published in ALRP since 2004, the majority concern action learning in the UK, but 50 papers (22 peer reviewed papers and 28 AoPs) concerned action learning in other countries. Many of these papers provide examples of action learning in another country with little or no focus on any cultural differences, including in the Netherlands (e.g. Donnenberg and De Loo 2004) Denmark (Saabye 2023) Norway (Finnesstrand, Vie and Boak 2023) France (Banks 2024) Spain (e.g. Garcia-Palao, Oltra-Mestre, and Coughlan 2019) Germany (e.g. Wegner-Kirchhoff 2013) Hungary (e.g. Csillag 2013) Morocco (Bahri et al. 2023) South Africa (e.g. Pillay 2022) Australia (e.g. Cother 2020) the USA (e.g. Curtin 2016) Thailand (e.g. Tritiptawin 2024) Taiwan (Chu 2024), South Korea (e.g. Bong, Cho, and Kim 2014) and elsewhere. Papers by Paquet et al. (2022; 2023) provide examples of the use of a variation of action learning in Quebec, which has grown out of an approach originally called *codéveloppement professionnel*, that they have used in Quebec for over 15 years, and which is also used in France and Belgium (see also Paquet et al. 2024).

Some papers on international action learning discuss cultural differences that are perceived to impact on action learning. For example, Mughal (2021) reflects on how attempts to use action learning on MBA programmes in Pakistan were challenged by cultural norms regarding gender inequality and respect for authority. Hirose (2022) suggests that members of learning sets in Japan need additional support to develop questioning skills. Edmonstone's (2019) exploration of whether action is culture bound summarises challenges posed by non-Anglo-Saxon cultures, including in the Philippines, Indonesia, and Pakistan – principally a preference to defer to authority that leads participants to expect to be told what to do by tutors, facilitators and managers, and an unwillingness to question authority figures, or each other. Burger and Trehan (2018) consider action learning in the context of East Africa and suggest that traditions and expectations of pedagogical practices in a culture may present the biggest challenge to the beliefs and practices of action learning.

However, Marquardt (2015) lists successes of action learning programmes and projects in China and suggests affinities between Chinese culture and the beliefs that underpin action learning, but also suggests some other aspects of culture that may challenge the use of action learning. Kong San (2006) describes how he developed and delivered a course called 'Introduction to Tao for Effective Action Learning' to gain acceptance for action learning by students at a university in Singapore – an example of conscious integration of the values of action learning with the values and traditions of a non-Anglo-Saxon culture. Brook and Abbott (2020) interviewed Westerners who had trained Chinese managers to become action learning facilitators and found the trainers had encountered fewer cultural obstacles than they might have anticipated. They report that, with some initial support, members of the action learning groups were very

willing to be open with one another and to pose questions and to work together to improve organisational performance.

The papers provide rich evidence that action learning can translate into many other national contexts, beyond its origins in the UK. However not all of the 70 plus nations mentioned by Edmonstone (2019) are represented here; it would be interesting to see a wider representation in future.

### *Action learning in healthcare*

Healthcare organisations were a setting for the early use of action learning by Revans (Revans 1972; Brook 2010) and they continue to be environments where action learning is practised. In ALRP a special issue in 2022 focused on healthcare, and there have been 20 refereed papers published in the journal to date and 19 AoPs. However, this understates the level of action learning activity in the sector that gives rise to publications: Boak's (2022) review of literature on action learning in healthcare 2011–2022 found 19 papers published in ALRP during this period and 51 papers in other journals, 46 of them specialist healthcare journals, including *Leadership in Health Services*, *Journal of Health Organization and Management* and a number of nursing journals.

The reasons why action learning is relatively popular in healthcare is probably that the sector contains often complex organisations and networks, where problems can only be addressed by groups of people from different professions, departments or organisations – thus providing suitable environments for action learning. A common interest in improving patient care is a powerful bond between most staff members and can provide a unifying mission that is conducive to collective action. In addition, many healthcare staff undertake professional development, and reflective practice and professional supervision are central elements of some professions, including nursing, activities that have resonance with action learning (Sanyal et al. 2022).

Boak (2022) found three main purposes of AL projects and programmes in healthcare: to improve services and organisational systems; to develop leadership capabilities, or other specific skills; and to improve connectivity and collective capacity, within or across organisations. In some cases, service improvement or individual development appeared to be the primary purpose of the project or programme: in other cases a mixture of the three intended benefits was sought.

Papers in ALRP on the use of action learning in this sector have included an account of how it was used to support senior clinical staff (Richardson et al. 2008), its use as part of a leadership development initiative for managers in a hospital, which resulted in individual development and a number of service improvements (Doyle 2014) how its use to develop the communication skills of holders of a new job role helped to achieve quality improvement (Joyce 2022) and an account of its use to develop system leadership capabilities as part of a programme for allied health professionals (Lindsay 2022). Papers focusing primarily on service improvement included an account of the use of action learning sets to investigate problems of achieving ambulance response time targets (Slater 2017), service development in a special care nursery (Wilson, McCormack, and Ives 2008), and an attempt to use action learning to bring about wide-spread change to end-of-life care (Winterburn 2022).

Some of the challenges that may be encountered when action learning is used in healthcare were identified by Sanyal et al. (2022) included high workloads of staff and

a lack of resource to support action learning activities, the systemic nature of some problems, and the difficulties of open communication across some professional boundaries.

### *Social action and action learning*

Many wicked problems affect society in general, while some may be felt especially keenly in particular communities, and are therefore suitable for action learning principles and practices. In his introduction to a special issue of ALRP focused on this topic, Pedler (2020) defined social action as action taken to achieve social improvement. There have been 37 papers in total in ALRP that address aspects of this theme (26 refereed papers and 11 AoPs), including the useful systematic review by Park, Cho, and Bong (2023) of research published in ALRP from 2004 to 2023, on social action and on healthcare aligned to the UN's Sustainable Development Goals. The special issue contained 13 papers on action a range of countries, including Nigeria, South Africa, Mozambique, Australia, Poland, Canada and Hungary, as well as in the UK.

Multi-agency working is often required to address social issues, and a paper by Rigg (2011) focuses on the use of action learning to facilitate this kind of working. She notes that 'Complex cross-cutting problems require not only whole systems thinking and joined-up policymaking and service delivery, but also different patterns of leadership and action ...' (17). The paper provides a series of examples of the use of action learning in cross-organisational social projects, and argues that 'Through changing their patterns of interacting as they engage in action learning, multi-agency participants enact systemic working' (20).

Social issues addressed in papers in ALRP include sustainability (Cother 2020; Abbott, Tscherne, and Weiss 2023) poverty (Boak et al. 2016) food insecurity (Marshall and Cook 2020) neighbourhood improvement (Rospigliosi and Bourner 2021) and community relations (Gold 2022).

A number of papers concentrate on the use of action learning in education and training for social workers (e.g. Wells, Animashaun, and Gibb 2017; Pedler and Hsu 2014; Garner 2024; Baines 2020) and Abbott, Burtney, and Wall (2013) provide an evaluation of a programme to train facilitators in social work departments to use action learning to support newly qualified staff.

Smith and Smith (2017) assess the value of using action learning with leaders of small social enterprises and charities, enabling them to network and learning from one another. Trussler, Shippen, and McCay (2024) report on using action learning to develop the leadership team of a small charity. Park, Cho, and Bong (2020) explain how action learning has been used to develop leadership skills for volunteers who play an active and significant role in social improvement activities in a city in South Korea. The paper offers a comparison of the use of action learning for social improvement with action learning to achieve business results.

### *SMEs and action learning*

Action learning takes place in large private sector companies as well as in public sector organisations and NGOs that promote health and social care, and a number of papers in ALRP focus on programmes in large companies such as Nokia (Ropponen 2008,

VELUX (Saabye 2023) the BBC (Felix and Keevill 2008) Volvo (Börjesson 2011) John Lewis (Spencer 2005) as well as a number of anonymized private sector organisations (e.g. Yoon, Cho, and Bong 2012; Wyton and Payne 2014; Wegner-Kirchhoff 2013).

A theme in ALRP papers concerns the use of action learning for SMEs and entrepreneurs. There have been 22 papers in total (17 refereed papers and five AoPs) and there was a special issue of the journal on this topic in 2009 (issue 6/3). Traditional forms of educational programmes for management and leadership development can have difficulty in demonstrating they are relevant to SMEs and entrepreneurs (e.g. Pittaway et al. 2009), whereas action learning is flexible and can focus on issues that are important to participants. In an overview of the special issue, Gibb (2009) argues that learning from action is central to effective learning of owner-managers of small enterprises, but that there are particular challenges for action learning facilitators in this sector.

Entrepreneurial action learning was one of the five themes identified in empirical action learning studies 2008–2021 by Cho and Egan (2023, 390), who characterised it as action learning ‘... used to enable entrepreneurs to engage with a social network of peers who become involved in a discursive process leading to reflection...’. Thorpe et al. (2009) argue for the importance of learning networks for managers of SMEs: ‘Learning networks allow groups of owner-managers to establish a space for dialogue, reflection and joint knowledge creation’. In papers published in ALRP, McGrath and O’Toole (2016), Jones et al. (2014) and Brett et al. (2012) provide accounts of using action learning and action research to establish learning networks of entrepreneurs.

A number of papers focus on using action learning in development programmes for SMEs and in projects that seek their involvement. Stewart and Alexander (2006) report on using AL on a flexible programme for managers of SMEs. Leitch, McMullan, and Harrison (2009) evaluate a leadership development programme for SME owner-managers and leaders. Rae (2009) describes using action learning to support new venture creation by university students. Cother (2020) provides an account of using action learning in Tasmania that engaged SMEs in a project to enhance sustainability, which achieved early positive outcomes; she provides an analysis of success factors and barriers. Gold and Jones (2023) explain how action learning contributed to a programme to enable SMEs to develop creative strategies for innovation.

### *Action learning in higher education*

A great many of the papers in the journal have been researched and written by academics in higher education institutions, and concern research projects, learning and development programmes they have carried out, in many cases in partnership with members of other organisations. For most of these papers, the HE environment is simply the background against which the featured project or programme takes place, but some include a focus on issues of design and delivery that are impacted by the environment.

Learning programmes that include action learning are most often designed for experienced managers or professionals, at master’s or doctoral level (e.g. Stephens and Margey 2015; Harrison and Edwards 2012; Wilson et al. 2021) but there are a small number of examples of inclusion in undergraduate courses (e.g. Csillag and Hidegh 2021; Groves et al. 2018; Hauser 2010).

The incorporation of action learning into a qualification-bearing programme usually means that it will co-exist alongside sessions on academic theories – programmed learning in other words (e.g. Pedler, Burgoyne, and Brook 2005; Beniston et al. 2014; Boak 2011; Ruane 2016), and it has been observed that the different inherent dynamics of the two types of session may prove problematic. As Garcia-Palao, Oltra-Mestre, and Coughlan (2019, 206) note, the learner-centred principles and practice of AL may challenge ‘... the role of the educator as a specialist, imparting domain knowledge to students without necessarily developing their abilities to think independently, to communicate effectively, to develop continuously or to act responsibly.’ This may give rise to difficulties for faculty, as facilitating action learning requires different skills from those required for more traditional didactic teaching (Boak 2011). The different learning dynamics may also challenge expectations of students, who may not engage with action learning components of a programme (e.g. O’Farrell 2018).

If there is an expectation that learners will carry out some actions in the workplace, then support for this from the organisation and in particular the learner’s line manager may be required, which in some cases may be problematic (e.g. Harrison and Edwards 2012). Another difficulty may relate to the resource-intensity of action learning, compared with large-scale lectures: Lawless and Willocks (2021, 126) reflect that action learning has become ‘increasingly difficult within a cost cutting HE environment’; they describe how they developed and delivered a short action learning event that was feasible within that environment.

The future of action learning in higher education is unclear. Brook and Pedler (2020), on the basis of interviews with a small sample of academics practising action learning, found a mixed picture and concluded that ‘... action learning flourishes in some parts and in some universities, especially in post-graduate and post-experience work, but elsewhere seems to have disappeared or been displaced.’

### *Critical action learning*

Critical Action Learning (CAL) has been described as ‘... a post-Revans response to the convoluted and political nature of action in complex systems of organisation’ (Pedler 2020, 4). Hauser et al. (2023) claim the term ‘critical action learning’ was first coined by Wilmott (1994) to link critical management studies with pragmatic management learning, although Rigg and Trehan (2004) draw on other papers published in the 1990s on action learning and a critical awareness of politics and power in organisations, including McLaughlin and Thorpe (1993).

According to Hauser et al. (2023, 117) CAL is characterised by a ‘persistent focus on the impact of emotions, politics and power relations on action learning’ both within the action learning group and in the organisational context within which action learning is taking place. They argue that the ‘underlying principles that guide CAL facilitation include belief in equality, diversity and inclusion’ (119). Participants in CAL are encouraged and supported to be critical of assumptions made about power structures and systems in their organisation and of power and politics in the interactions within the action learning group.

Although he does not use the phrase ‘critical action learning’ Vince (2004) is nevertheless concerned with the impact of power, politics and emotion on action learning, themes

he followed up in papers in ALRP in 2008 and 2012. In 2008 he argues that practitioners of CAL should be aware that action learning can give rise to ‘learning-in-action’ but also ‘learning inaction’ – a collusion to avoid learning and avoid action.

A number of papers provide useful detailed examples of CAL in use. Rigg and Trehan (2004) provide an account of the use of CAL on an MSc programme; Vince (2008) shares vignettes of learning-in-action and learning inaction in a CAL programme in a healthcare organisation; Pedler and Hsu (2014) explore unlearning in the context of CAL to help social workers tackle wicked problems; Shepherd (2016) describes how he used what he calls Critical Reflection Action Learning to help an organisation improve the way in which it tackled complex, messy problems; Scott (2019) reflects on his experiences of learning how to facilitate CAL; Hauser et al. (2023) provide examples of the dynamics of facilitating CAL and offer a practice guide for facilitators, while Hauser and Vince (2024) describe a process they have used successfully to facilitate CAL with groups.

### *Virtual action learning*

Virtual action learning (VAL) occurs when some or all of the communication between members of an action learning set takes place online. Between 2006 and 2024 there were 18 papers about the use of VAL (eight refereed papers and 10 AoPs). Cho and Egan (2023) identified VAL as a theme in papers on action learning published 2008-2021.

The first paper in ALRP on virtual action learning was published in 2006 when Stewart and Alexander gave an account of an EU-funded project to use virtual action learning with managers of small and medium-sized enterprises. It was planned to enhance the flexibility of the programme by providing a mixture of face-to-face meetings and online workshop, with virtual interaction between meetings, but the participants reported problems with using the technology, and Stewart and Alexander reflected on the impact of digital literacy of participants on their take up of the online aspects of the programme.

Eighteen years later, after the impact of Covid-19 on in-person meetings, and considerable developments in technology and user familiarity with video conferencing tools, there have been many more papers concerning virtual action learning, including an account of the use of VAL on a master’s programme by one of the authors of the 2006 paper. In this later paper Stewart (2024) provides a thorough summary of papers on the use of VAL published in ALRP and elsewhere; she then describes how VAL was used on the master’s programme at her HE institution, and shares an evaluation of its use by participants and facilitators. Her paper also summarises differences and similarities between VAL and in-person action learning, and advantages and disadvantages of both approaches, as she sees them. The paper concludes with 16 recommendations for VAL facilitators. In another recent ALRP paper Caulat (2022) shares her reflections on practice on the basis of 19 years of experience of using VAL.

Earlier publications include Hauser (2010), who provides a review of literature on the use of VAL, and gives an account of the use of VAL in his university, with some reflections on effective practices. Dickenson, Burgoyne, and Pedler (2010) trace early uses of VAL to the 1990s, and report on the technologies used in VAL up to the date of publication. A small scale study of the use of VAL as a follow up activity to an in-person leadership development programme found that participants were very positive about VAL, although meetings were by audio only, and challenges were experienced in using the technology (Radcliff 2017; Aspinwall, Pedler, and Radcliff 2018).

Since 2020 when, as Caulat (2022, 201) puts it, Covid ‘catapulted the whole world into virtual’ there have been many more accounts of the use of VAL, including its use with undergraduates (Csillag and Hidegh 2021) and with a large-scale management development programme (Willocks and Rouse 2024). There are obvious benefits to VAL when participants are geographically distant from one another (e.g. Wilson et al. 2021; Hauser 2010). Using VAL also enables large numbers of participants to be brought together (e.g. Callaghan and Collins 2021; Paquet et al. 2022).

Several papers discuss issues such as the quality of communication and relationship-building in VAL (e.g. Stewart 2024) whether there is a need for more structure and facilitation (e.g. Aspinwall, Pedler, and Radcliff 2018; Caulat 2022) and the advantages and potential drawbacks of mixing in-person and virtual meetings (e.g. Hauser 2010; Caulat in Aspinwall, Pedler, and Radcliff 2018).

### *Action learning research*

There is an overlap between action learning and action research, which can give rise to synergies and (sometimes) to confusions. A short paper by Rigg and Coghlan (2016) discusses perceived similarities, differences and complementarities between action learning and action research, and asks ‘whether it matters’. They note that the foundation literatures are largely separate, and each has ‘differing origins and forebears’ (201) but that there are similarities and overlaps in that each are focused on tackling real-world issues in organisations or communities. A difference that is typically suggested, Rigg and Coghlan note, is that action research is more concerned with propagating knowledge that it gains to a wider audience, whereas action learning is often focused only on those directly involved. However, as they also point out, the publication of papers in ALRP is an act of propagating knowledge: in that respect all the papers in the journal might be considered examples of both action learning and action research.

The term ‘action learning research’, used to indicate a hybrid of the two activities, appears to have first been used in Coghlan and Pedler (2006), a paper that discusses ways in which action learning research (ALR) may be conceptualised and how dissertations using ALR that form part of academic programmes may be carried out and evaluated. An earlier paper by Bourner and Simpson (2005) discusses how action learning may be used to drive doctoral research. Ruane and Corlett (2024) provide another example of ALR being used to create academic research outputs in the context of a post-graduate programme, as they describe how ALR is used to conduct projects on an MBA. A paper by Quew-Jones (2022, 151) provides an account of an action research project on improving relationships between a university and employers delivering an (management) apprenticeship course, where action learning sets were ‘a principal vehicle for data collection with ambassadors from contracted organisations’ (151).

Coghlan and Coughlan (2010, 201) propose four dimensions of ‘quality in action learning research’, but perhaps they may first be taken as characteristics of ALR:

1. ALR engages with real-life problems or opportunities
2. ALR is collaborative – action learning researchers work as co-researchers with members of the system they are researching

3. ALR works through cycles of action and reflection, aided by the working of a small cohesive group, with 'egalitarian participation'
4. ALR produces workable outcomes and actionable knowledge

Coghlan and Coughlan (2010) go on to populate each of these four characteristics with useful details of how the quality of an example of action learning research may be assessed.

## Conclusion

ALRP offers a rich resource for practitioners and scholars of researching action learning.

This paper has focused on the different environments in which action learning has been practised and on some of the variations of action learning represented by publications in ALRP. Other themes are doubtless discernable in the collection of papers published in the journal, waiting for different researchers and readers to pull together evidence of them and to elaborate on what has already been presented. A fruitful area of further analysis, for example, might be themes about the behaviours and skills perceived to be needed to take part in action learning, as a group member and as a facilitator.

The papers discussed here, and the larger collection of papers there has not been time or space to discuss here, do not represent an ending or a comprehensive understanding of action learning, but can provide a useful foundation for further exploration and research.

## Disclosure statement

No potential conflict of interest was reported by the author(s).

## Notes on contributor

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