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Developing skills of action learning facilitators

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ABSTRACT

This Account of Practice concerns a short training programme for action learning facilitators, which celebrates its 10th anniversary this year. The programme is run on action learning principles and it involves participants working as an action learning set, taking turns to act as facilitators, set members, and issue holders, and reflecting on the processes they experience and the learning they are gaining. They are supported by two experienced action learning facilitators. The paper explains how these learning processes are structured and enabled, and also shares examples of the models that are used to help participants understand how best to learn through engaging in new experiences and to support the development of the fundamental facilitation skills of listening and asking questions.

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facilitation skills; action
learning skills

Introduction

George boak

This Account of Practice concerns the design and implementation of a short programme of training and learning for action learning facilitators. The shape of the programme has developed over time, although some processes and content have been constant from the outset. This paper explains the main processes that are used to help participants learn and then focuses on a small number of key skills that are addressed during the programme.

My role in this paper has been in the main to encourage and to help Fiona tell her story of the creation of the programme and how she and her colleagues at the Action Learning Centre go about helping their participants to develop these key skills. Writing the paper has involved initial conversations and email exchanges, a recorded and transcribed interview, more conversations and email exchanges and the writing and re-writing of various drafts. It also benefited from working with Fiona to film short video lectures on action learning, some of which focused on the skills she discusses here.

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A programme to develop the skills of action learning facilitators

Fiona Scrase

I am one of the co-founders of the Action Learning Centre, which has been going on for 10 years. We run the facilitator development programmes through the Centre. However, I was introduced to action learning in 2000 at Sheffield Hallam University when I was doing my CIPD course. I was working at the City of York local authority at that time, and a couple of years later I arranged for a consultant to deliver some training in action learning, which I attended. By 2003 I had left the council and was working freelance as a coach and consultant, and I was engaged by a big NHS trust to train an internal team of renal nurses to facilitate some action learning sets and also facilitate a couple of sets.

Now we run these programmes regularly, both for corporate clients and open courses for individuals. Our core programme, which we call our Action Learning Facilitators Essentials is three days long. Most of it, we run as an action learning set, with 5–6 participants and two trainers, and I have done this from when I first designed the programme.

The first day is more about establishing the group, and providing an introduction to action learning: what is it? What's the purpose of it, where and how do you use it? And also outlining some of the core fundamental skills, both those required by participants and also by facilitators. Days two and three are taken up with practice, review, and reflection.

With in-person courses, we run days one and two consecutively and then have a gap of about three weeks before we have day three. For virtual courses, we deliver over six half days.

In the practice sessions, on days 2 and 3, everyone has opportunities to play each of the three roles – facilitator, issue holder, and set member. Each participant facilitation practice is followed by structured reflection and discussion on the processes and learning. For example, at the end of a session, everyone is given three or four minutes with some prompt questions on a sheet, to capture their own learning about what they noticed: What went well? What didn't? What questions arise? And equally, what's their learning around facilitation that's come out of that. As part of the debrief and reflections discussion, the person who was facilitating shares their own reflections and observations. Then the group had a conversation about what they saw went well and what could have been different, and what is their learning about the process. The approach we have developed is very practical – it is learning through doing.

To help build participants' confidence and embed the learning we have recently added another session between days two and three, where the participants meet without the trainers in an action learning set and work with one another. This enables them to test out what they have learned and identify where they still have questions. We have found that this extra session tends to boost their confidence as they realise they are developing the skills they need.

The other reason for the gap between days 2 and 3 is it mimics the action learning cycle. It allows participants to experience bringing an issue, identifying actions, taking action, and coming back to provide an update. Participants gain the experience of working with real progress updates, surfacing the learning and insights gained from their actions.

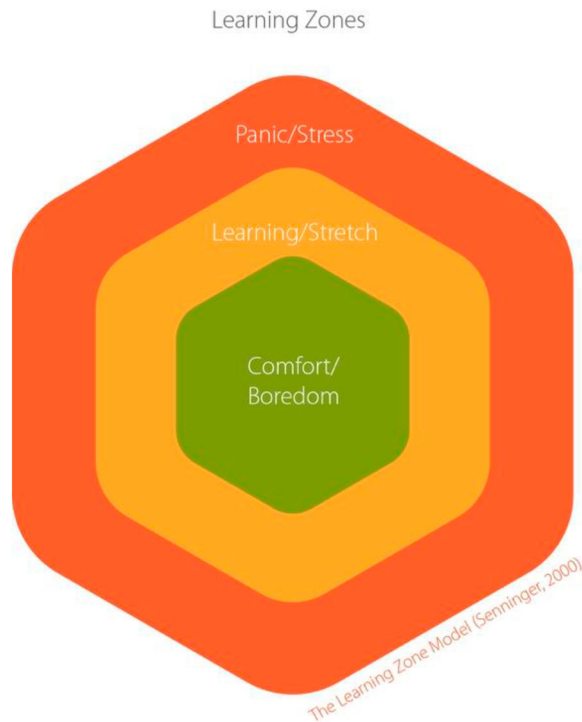


Figure 1. Learning Zones Model, the Action Learning Centre (based on Tom Senninger).

This practice-based approach needs participants to try new things – whether as facilitator, issue holder, or set member – and to step outside their comfort zone. From an early stage in developing the programme, I realised that participants often need support in understanding the learning process and the need to stretch. We use the Learning Zone Model that has been popularised by Tom Senninger (see [Figure 1](#)). We share this with participants on day 1 of the programme and often refer back to it during days 2 and 3 as it applies to participants learning to facilitate and also the members of sets they will facilitate.

In the Comfort Zone, we are doing things that are well-known and familiar. In the Learning Zone, we are doing new things, experimenting, and stretching our capabilities. In the Panic Zone, there is too much that is new and challenging and we can feel overwhelmed. Participants won't learn from the programme if they stay in their Comfort Zone, but they should not feel so challenged that they slip into the Panic Zone.

As participants first practise the roles there can be awkwardness. Sometimes people feel motivated and inspired, whilst others feel embarrassed or uncomfortable because what they are doing is new and not in their Comfort Zone. So, at the start, we say this course is about stretching you, and for you to try things out that are going to feel unfamiliar, because they're just not things you've done before. We find this positioning very helpful, and get feedback from participants that they find it valuable. Success in the Learning Zone can be achieved by learning socially, by working with trusted colleagues where you feel psychologically safe, as well as by support from the trainers, and we work with the group to develop this positive environment.

We also introduce on day one the well-known model of the four stages of learning¹, the idea that when we learn a skill we can progress from the stage of unconscious incompetence, to conscious incompetence, to conscious competence and then (perhaps) to unconscious competence. It is useful to refer back to this, too, in days two and three.

During the programme, participants learn a number of skills that are important for facilitators, and there is not space in this paper to discuss them all, so I am going to concentrate on two fundamental skills, that of listening and of asking questions. Not only do facilitators use these skills, but they also need to help set members to practise the skills: this will make the set more effective and supportive.

To help people develop their listening skills we do a lot of practice and reflection and we also use a simple model to help participants distinguish between different levels of listening. It's a model from the co-active coaching approach (from Whitworth, Kimsey-House, and Sandahl 1998), which I first came across in 2002. I have found it maps really well across to action learning (see [Figure 2](#)).

Level one listening is an internal listening to self, which isn't just our own thoughts, but also our body and our emotions. Level two is listening with a hard focus on another person – such as the issue holder – and taking in what they are saying at the same time observing the non-verbals, such as body language and emotions. Level three is about being aware of the whole environment of the set. The model maps very well to the three roles in action learning. When an issue holder is talking about their issue, ideally they will be internally focused, listening to their own thoughts as they dialogue out their topic (level one). You want the set members to really focus on the issue holder, listening to them, and then allowing the questions to surface from there (level two). The facilitator should be in level two/three, where they are listening to the issue holder but also aware of all that is going on in the set. We find it is a useful model to

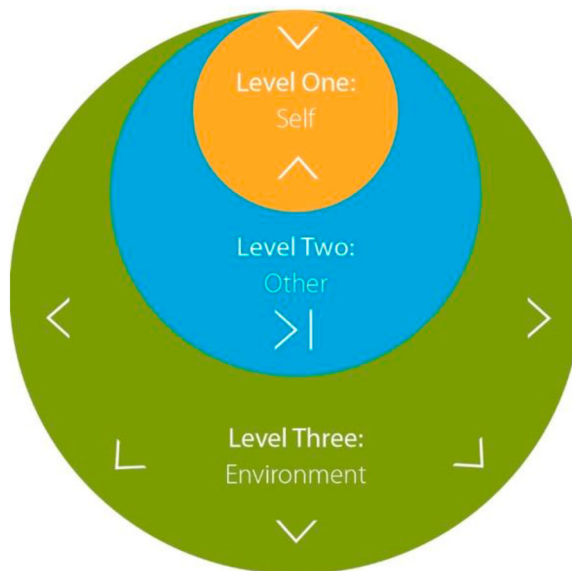


Figure 2. Levels of listening, the Action Learning Centre (based on Whitworth, Kimsey-House, and Sandahl 1998).

introduce early on; it is good for people to get used to understanding when have they gone into level one, and they are no longer really paying attention to the issue holder or the rest of the group.

We encourage those we train to use the same model with their sets to help develop awareness of how and what they are listening to.

Facilitators also support set members to develop their questioning skills. In my view, facilitators need to have good questioning skills to model insightful questioning and help their set members collectively and individually ask questions that support issue holders in their thinking. A phrase we use in the training is 'the quality of an issue holder's time is directly related to the quality of the questions asked.'

Generally, most people are not taught the difference between types of questions or what they elicit. In action learning we are looking to use mainly open questions that aid the issue holder consider and reflect in order to deepen their knowledge and gain insights into how they are feeling, their beliefs, attitudes and assumptions, alongside the facts of the context and how these might be influencing their perceptions, behaviours, choices, and actions.

Given this, we focus on developing questioning skills and how to intervene to support the set ask powerful questions. Over time we have developed a framework of types of questions for facilitators to use to help them and their set members to have a common language in identifying helpful questions and those that are leading questions, or hidden advice, where someone's opinion masquerades as a question.

For example, one useful distinction is the difference between information and discovery questions. Knowing and noticing the difference and asking the set to reflect on the responses these questions evoke can raise the awareness of a set about the impact question types can have and therefore change the quality and outcomes of a session. Information questions seek information, facts, figures and sometimes background details from the person being asked. These are usually facts that are already known to the issue holder, so they exercise memory to respond. They prompt the issue holder to provide information to enable the set member asking the question to understand more of the situation.

Discovery questions, on the other hand, are usually open, curious questions which invite the issue holder to consider something new, reflect or think more deeply about an aspect of their situation. The response brings insight, a new perspective, even a light bulb moment. Discovery questions serve the issue holder, whereas information questions serve the asker.

We use a variety of handouts, practice, and reflection exercises throughout the course to help participants learn the difference between the types of questions and to become better at asking open, discovery questions (see [Figure 3](#)).

As well as helping an issue holder to think more deeply about their issue, discovery questions can also be used to surface learning in the whole group, where they can be used to stimulate reflection on processes within the set, and encourage learning. Questions are such an integral part of an action learner's toolkit.

There are many other skills that facilitators need: these include managing the process – we use a model of the process we recommend for the whole set meeting and for each discussion with an issue holder. Managing each different stage of the process requires certain skills and techniques, from the initial agreement of ground rules, to deciding which issues will be discussed, right through to handling the progress update, when set members report back on what progress they have made with their issue. An important

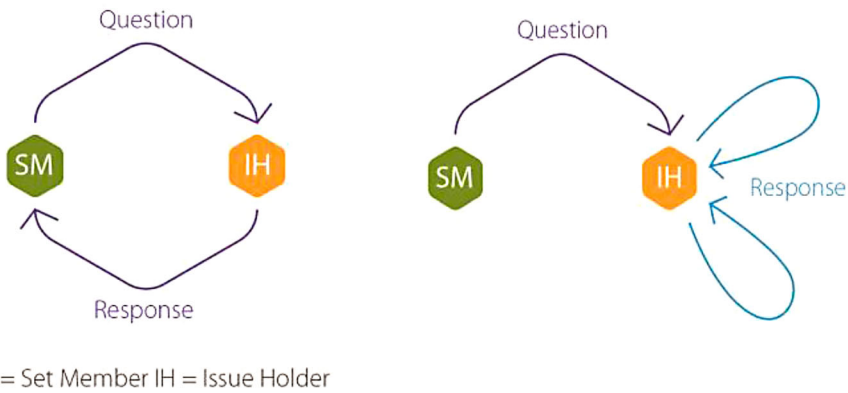


Figure 3. Information Question and Discovery Question to an Issue Holder, the Action Learning Centre.

facilitator skill that might be needed at any stage is exercising judgement on whether to intervene in the discussion, and deciding when and how to do so.

Reflections on what has made the programme successful

When I started training facilitators in 2004, it was important to me to create a programme that used action learning principles and processes, one in which the participants experienced all the roles. Nothing is role play in our training. Participants learn by working as a set and reflecting on what happens. This builds an awareness of the challenges each role might experience; the vulnerability of an issue holder, the struggle of asking open questions rather than giving advice when a set member, and juggling the many tasks and being alert to what's going on as the facilitator. It creates rounded facilitators who can have empathy for their set members.

What I also think makes the programme successful is participants have two opportunities to facilitate and experience several examples of others facilitating. We notice a big difference usually between the first and second practice sessions.

Plus the review and debrief discussions surface a lot of learning. We talk a lot about learning from the hiccups and mess of experimenting. It's not about getting it right. This creates permission in the space.

One comment we often get is surprise at how quickly the group feels safe. This is in part due to the work the trainer/facilitators do to acknowledge and create that psychological safety and work with the action learning principles.

It is also due to the fact that we regularly review the courses, how they are going, and reflect on where we might improve or change the content. This includes our supporting materials such as handouts and videos.

My own learning from the programme

Training action learning facilitators is such a privilege, as there is a two-way trade. Over the years, I have trained a wide variety of people from different backgrounds. They

each bring their skills and their own take on how they position something, how they intervene, and their own levels of empathy, intuition, challenge. I have gained many insights observing them within the training arena, which has supported and informed my personal facilitation practice.

I find myself afterwards thinking about events on the programme and how I might change my approach, or run different exercises to enable participants to learn about action learning and facilitating.

I have been pulled up or even given feedback by participants that has led me to change some aspect of my facilitation. One insight I got a few years back was that I had begun to fall into the trap of stating the learning, especially when pushed for time, rather than asking questions to get participants to reflect on their own observations and what they draw from those.

What I've also learnt is that no two groups are the same and there is always a level of healthy uncertainty and need to flex and flow, as there is with facilitating.

More recently, when we changed to running our courses online we took the decision to use two facilitators per programme. This has created a lot of learning for the whole team. Being an action learning facilitator is a lonely role. We don't always get feedback on our practice, our blind spots and habits. Working with a fellow facilitator and hearing them describe how they might work with their sets or manage a situation has proved to be very valuable.

I believe we never stop learning and refining our facilitation practice.

Note from George: the four stages of learning. In the mid-1990s, I was part of a national project that involved academics from a number of UK university business schools, and one day the conversation turned to the four stage model. All of us were familiar with it, but none of us could cite an originating source for it. Of course, this was at a time when the World Wide Web was in its infancy, and we were not able to use search engines for an answer to such a query. Fiona originally cited Noel Burcher as the author of the model and indeed Wikipedia says that he used the model in the 1970s when he was an employee of the Gordon Institute. However, Wikipedia also says that the first description of the four stages was in De Phillips, Berliner, and Cribbin (1960, 69), and indeed you can access that text online and see the description there. GB.

Notes on contributors

Fiona Scrase was introduced to action learning in 2000 when working in a local authority as a Learning and Development specialist. Since then has designed and facilitated action learning programmes for a variety of clients ranging from drug and alcohol support workers, business owners to air scientists and senior leaders in various sectors. She is a Principal Consultant at the Action Learning Centre (ALC) Limited which she co-founded in 2013 where she delivers facilitator training and continues to work with action learning. Her interest outside of work lies in organic vegetable gardening.

George Boak has worked on aspects of individual and organizational development for over 30 years, with managers and professionals from a wide range of private sector companies and public sector organizations. He is particularly interested in how change can be brought about in complex organisations. He is an associate professor in leadership and innovation at York St John University, where he is a core member of the team delivering York Business School's suite of executive MBA programmes. g.boak@yorksj.ac.uk

Disclosure statement

No potential conflict of interest was reported by the authors.

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