

Action Learning as Relational Practice

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Abstract

In this paper we propose that all knowledge is made through social processes and is political (of the people involved). If one invests in a relational or historical ontology (a philosophical choice) there are implications for the way Action Learning is practiced. We illuminate some of these 'relational practices'. We purport that action learning cannot be viewed solely as the activities of individuals who get together as 'comrades in adversity' if organizational change is to be achieved.

Key words: action learning, relational orientation, organizational development.

Introduction

This paper tries to offer different insights on how Action Learning might be practiced and what we can aspire to if we recognize and investigate the social, linguistic, political and historical processes that create the phenomena we are looking at. We believe that thereby, there may be a chance of working together to change things in organizations in ways that all stakeholders agree to be 'better'. This can help organizations to find sustainable answers to the quickly evolving business challenges and changes that they are currently faced with.

In this context, we often find it convenient to work out of a three-fold framework of worldviews, or 'stances', some aspects of which are shown in Table 1¹. We are not saying that any one of them is generally 'better' than another - indeed, according to the situation, it may be more appropriate, more productive, to *choose* a particular Stance (Dewey 1951). We are also not saying that the Table is complete and has in its entirety been derived from theory. We are presenting the Table as a provisional, logical framework that has seemed to make sense in *our* practice and enabled people in complex situations to achieve things together. We will elaborate on this below.

We believe that consultancy tools/processes for Stances 1 and 2 have been more developed than those for Stance 3. However, we find, in our consulting practice, that our clients are facing what we might term "complex" problems and issues, such that we believe Stance 3 to be called for. That is, when:

- Several diverse parties are involved - individuals, teams, departments, professions, agencies, interest groups, clients/customers, suppliers, neighbors - each with a stake in the situation and its outcomes;
- Each stakeholder has their own perspectives, interests, practices, ways of seeing the world, traditions, histories, aspirations and priorities;
- There is social fragmentation and disconnection between these stakeholders, getting in the way of collective action;
- Within the overall community of stakeholders, power, purpose, knowledge and risk are widely but unequally distributed;

¹ The word 'Stance', in our view, indicates that it is possible to make a conscious choice about which of the three to work out of, to 'stand in', at a particular moment, in a particular context. In earlier formulations we sometimes referred to them as "Levels", with parallels to various stage models of learning (eg Boydell 2005)

- Novelty, uncertainty, ambiguity are prevalent;
- Needs and problems are interconnected - addressing one requires us to address others; solutions to a problem in one part of the organization/community may cause more difficulties in other parts...
- ...or at a later time;
- Therefore working linearly, serially - tackling problems on their own, in one place, one at a time - is ineffective. We must work on many fronts at the same time;
- We need innovative solutions rather than simply being better at what we already do;
- Such solutions are unlikely to come from one source - we need to share ideas, create solutions across stakeholder boundaries.

Although Action Learning has originally been developed to manage much of this, we think a much narrower conception of Action Learning has often been practiced in recent times (Revans 1982, Wallace 1990).

TABLE 1 Provisional framework of worldviews².

	STANCE 1	STANCE 2	STANCE 3 ³
Possible labels	Positivist	Critical Modern, Critical Positivist, Phenomenological, Constructivist	Social Constructionist, Relational
Nature of theory	<ul style="list-style-type: none"> - Objective facts/truths about the world - accurate descriptions/ explanations of objective reality, discovered by experts/authority figures deemed as entitled to create knowledge; we accept what they tell us as 'given truths', as 'real'. - Ideas established because accepted as 'true'. - - Experts recognize that some truths may be incomplete or even incorrect; they need to strive to improve our understanding, which may require us to change what we believe to be 'true'. Rival 'truths' may conflict - authorities strive to prove theirs to be correct. The 'winning truth' often a result of power - not 'knowledge is power' but 'power is knowledge' -power to fix meaning, to say which truth is correct. - 	<p>A subjective picture of the world constructed by the observer. People construct their own meanings, mental models, from their own experiences, coping mechanisms and interests. This may tell us as much about that observer as it does about the phenomena they are studying and describing.</p> <p>Constructs result from the interplay of outer happenings/ experiences in the world and inner attributes/characteristics that make up the self. People often have strong feelings about their constructs, seeing these as part of their unique self. If we want to influence people, to change their mental models, we have to 'capture their hearts and minds'.</p>	<ul style="list-style-type: none"> - Words, objects and people (including 'selves') get meaning from the way they are 'used' in particular social contexts, - constructed and held in place to achieve social goals and maintain historical practice. Individuals are born into social practices and so are in-formed. Knowledge is seen as not independent of social interest. - - Our diverse senses of self are not fixed inner phenomena, but are expressions of relationships and reciprocal interactions within particular contexts - in other contexts our 'selves' will be different. - - Each context includes not only people and objects actually present, but also memories, historical voices, stories. Different

² For more details, refer to Gergen (1997)

³ Relational and historical ontologies constitute the world we humans observe. All knowledge is made through social processes and is political (of the people) (Russell 1972).

			people and groups bring their own cultural processes, practices, traditions, talismans, histories, and perspectives. These make sense to them, work for them, and are legitimate in their community's eyes, rather than 'correct' in some absolute sense.
Purpose of theory	To provide a basis for action where there is an accepted recognition of a right way of doing things - e.g. standard procedures, safety regulations, legal requirements - which may change over time. <i>Liberation</i> of ordinary humans from the oppressive control of King or Church.	To improve our understanding of the truths about the world, including 'what makes people tick' - social behavior, how individuals learn - the psychology of the self. <i>Liberation</i> of the individual from the 'tyranny of experts' ⁴	<ul style="list-style-type: none"> - To appreciate connectedness, relational cause-and-effect. To enable mutual experiences of temporary alternative processes, sets of agreements, rules, ways of doing things, where we can 'suspend belief', shift the pattern of shared meaning, find pragmatic ways of working and achieving things together. - <i>Liberation</i> of our futures from our pasts.
Sense-making and sharing processes	Referring to rulebooks, databases, procedure manuals that tell us what to do, derived through <i>expert</i> discourse.	<i>Participative</i> experimentation and reflection. Plan-Do-Study-Act. Individual and group reflection. Dialogue - to appreciate how others make sense of the world.	Appreciation of the relationship between talk and its effects on the others and the social context. Reflexive conversation, story telling, art, performance. Dialogue - a process of acknowledging that we are coming together from different sets of rules. Focus on what constitutes social processes, the role of power, an unambiguous

⁴ Refer to Lieberman (1970).

			appreciation of 'other'.
Context in which the Stance is useful	<p>Where we have:</p> <ul style="list-style-type: none"> • Acceptance/collusion with stated purpose - what we are trying to achieve; • acceptance of the power held by those who define or clarify that purpose; • acceptance of the truths held by our experts, databases, procedures etc. 	<p>Where we have:</p> <ul style="list-style-type: none"> • agreement of purposes - what we are trying to achieve; • acceptance of the power held by those who define or clarify that purpose; • a shared desire to find a better way of achieving it; • acknowledgement that 'expertise' is widely distributed, (e.g. by workers in the process; by service users) and not solely in the hands of a few elite specialists. 	<p>Where we have</p> <ul style="list-style-type: none"> • multiple stakeholders... • ...with different purposes and priorities... • ... diverse types and levels of risk... • ... varying levels of distributed power to make things happen/not happen... • ... who nonetheless recognize that they need to work together in order to move forward, to do better things.
'The metaphorical Learning Equation'	<p>$L = P$</p> <p>L equals <i>Learning</i>, P equals <i>Programmed Knowledge</i>⁵</p>	<p>$L = P + Q$</p> <p>Q equals <i>Questioning Insight</i></p>	<p>$L = P + Q + R$</p> <p>R equals <i>Relational Practice (to be discussed next)</i>⁶</p>

⁵ Revans (1982) proposed the equation $L = P + Q$. That is, Learning equals Programmed Knowledge plus Questioning Insight.

⁶ The formula $L = P + Q + R$ is also used by Marquardt (1999). However in that formulation 'R' denotes 'Reflection', which is quite different from 'Relational Practice'. We subsume Reflection under Q - we see it as part of the process through which Questioning Insight is generated.

Stance 3 Action Learning

Notwithstanding some disagreement as to what 'Action Learning' is (Pedler *et al.* 2005) we believe that to a great extent it has become a Stance 2 activity, not able to bring about sustainable change in complex organizational situations, but tending to become a vehicle for individual self-development (Juch 1983, Wallace 1990).

We assert that to tackle complex organisational, community and networking issues our attention needs to shift; from being transfixed by the notion of learning being inside the minds of individuals, to focusing on the network of social relations, processes and encounters in which people are immersed, and to what those processes bring about. We feel we need to re-introduce Relational Practice into the activity repertoire of Action Learning, such that the 'problem' is always seen and expressed in connection with ways of examining the patterns of encounter that position participants/actors and afford or constrain action (Revans 1982)⁷. Thus we believe there is likely to be more explicit exploration around⁸:

- **power relations**; talking about the relative consequences of saying-doing something different from others' expectations.
- **forms and patterns of language**; dominant vocabularies, phrases, metaphors; also those that are *not* used.
- **face (possibilities, maintenance and threats)**; exploring the acts involved in presenting a 'face' that will enable people to act (being accepted, being seen as 'normal', colluding in doing the same for others). This is associated with 'risk'.
- **codes of politeness**; making more *explicit* the *implicit* expectations of 'poise' in any given context - 'knowing one's place', dress codes, forms of greeting, acceptable forms of talk.
- **what goes public, what stays private**; making it possible for that which is kept private to be expressed or vice versa!
- **knowing how to take a turn**; literally 'taking a part' - changing the balance of participation in the patterns of encounter - distributing talk and power.
- **when to make a turn into a 'move'**; encouraging the distribution of that form of talk which is a 'knowing decision', either to respond to others' proposals or to make proposals which have pragmatic implications for the balance of relations and risk to self and other.
- **the constraints and possibilities of co-operative symmetry**; exploring the role played by 'expectation', which is often unknown to us all in a given context; what happens when expectations are not met.

Appendix A is a questionnaire - a working device - that we have developed and that draws attention to many of the processes listed above.

It is problematic to attempt to work with relational issues when set members are not ordinarily joint actors in any given 'problem'. Therefore relational Action Learning practices are likely to include people who have an interdependent connection to the problem/activity. It is difficult to bring the relational into the conventional stranger-group format, although it is possible, in such a setting, to move towards the relational by encouraging participants to examine their own meaning-making processes and to suggest that they engage in conversations with other stakeholders or actors in their problem to do the same.

We are not against those forms of Action Learning where set members come together solely as 'comrades in adversity', whose work/life is otherwise not connected (Revans 1982). However we are saying that in that kind of meeting the critical action is somewhere else -

⁷ In our practice we have decided to call this approach 'relational action learning'.

⁸ A number of authorities have written extensively on these issues, although not in the context of Action Learning. Here we will just refer to two of the most seminal sources, namely Fairclough (1989) and Goffman (1967, reprinted 1982)

so it easily becomes ' *talking about* action and learning' rather than ' *doing* action and learning'.

With groups and networks that include related stakeholders we often highlight existing patterns of talk - i.e. patterns of action - by disturbing them in various ways. (Blantern and Anderson-Wallace, 2006a and 2006b). For example, after someone has spoken we might ask them what they intended to make happen as a result of that comment, and what do they think it has in fact made happen. A variant of this is to record the meeting and take digital photographs as people speak. We then select what appear to be critical moments and put speech bubbles on the photos, showing who said what. The meeting is 'replayed' and we ask people how they responded to what was said - their 'silent inner conversation' being added to the photograph. Next we invite the person who spoke to have a second chance, as it were, by choosing, in the light of what they now know, to say something different, which is immediately entered into the speech bubble, and the meeting is in effect reshaped.

We see that conversations are often heavily influenced by patterns of power. If we notice that only senior people are initiating talk, we might impose a temporary rule - that for the next 20 minutes only those below a certain grade are allowed to speak. Another related process is to issue everybody with some form of token that they 'spend' each time they speak; once you have used all your tokens you cannot say anything more.

These interventions can work well with relatively small groups. Engaging with people representing many stakeholder groups -say 200 or more people in the room- calls for tightly structured processes that allow each group to have a voice and to be heard

So we might say the main purpose of relational Action Learning practices is to create a temporary space where the pattern of encounters and accompanying network of actors can find a different architecture or shape. These practices deal, in a here-and-now way, with the issues of power and politics that are so often ignored or considered taboo. In this way the learning is not only within individuals but also in the social spaces between them. Learning is Programmed Knowledge and Questioning Insight and Relational Practice - $L = P + Q + R$.

Perhaps we can conclude by relating these relational practices to some of the themes and questions raised in the Call for Papers for this special edition of the Journal. We have shown that our client organisations are, increasingly, faced with "complex" problems which require relational practices for working across boundaries, with many diverse stakeholders. Problems can thus be tackled in a way that involves many people - across levels, functions, units and so on - in learning and problem solving, each working not only on their own interests but also on those of other stakeholders, including of course customers and clients, but others too.

We believe that by specifically working with relational processes - which necessarily involve the raising of consciousness about alternative assumptions, mindsets, ways of making meaning - then there is a much greater possibility for building a lasting relationship between organizational change and Action Learning, not only establishing patterns of continuous improvement of *what we do already*, but also creating *entirely new* processes and products. We might then say that, in broad terms, Stance 1 is about "Doing Things Well", Stance 2 "Doing Things Better", and Stance 3 "Doing Better Things".

TABLE 2 Principal differences in Action Learning practice between Stances 1 and 2 and Stance 3⁹

⁹ We might have chosen to separate out Stance 1 and 2 practices. However we are trying to draw attention to the development of a Stance 3 approach and as such are treating Stance 1 and 2 practices as cumulative despite the fact that not all of the underlying theoretical views may easily be combined (Russell 1972).

	Stances 1 and 2	Stance 3
Set or community composition	Individuals connected as 'comrades in adversity' - but often strangers from different work sites, teams, communities or organizations.	People connected by having a stake in the same task, problem, or issue.
Character of 'problem' ¹⁰	Problem defined, challenged, characterized and] owned by individuals.	Same 'problem' affects everyone ¹¹ (more or less). Problem seen in terms of how participants have effects on each other - help/hinder, include/marginalize, explicit/implicit etc.
Focus of attention/site of learning	Individual's attitude, mind set, assumptions, competence, confidence initiative.	Characteristics of interaction; how power works; face saving strategies, public/private talk, forms of talk, - openness to effects on each other.
Where the 'Action' is	Context is nearly always 'somewhere else' - usually back at work. All expressions are a 'report' of the context.	Context is in the room. Power, face and risk relations are present - expressions of the 'problem' in action are accessible.
Principal situated learning activity	Reflection on and reframing of own assumptions/ beliefs, leading to ideas for action back 'on the job'	Joint and several: - <i>Enquiries</i> into each other's context, history and concerns. - Sharing of <i>purposes, expectations and imagination</i> . - Proposals for new talk/action and openness to others - begins on shared task - 'in the room' - the work context is not somewhere else; if it feels like work is outside the room the right people & things aren't there!
Facilitation/advisor style	Attention to individuals' demeanor, expression, reflexivity and openness. Support and challenge - turn by turn. Individuals are addressed.	Attention to effects of everyday talk and action on each other and shared 'problem'. Intervenes to enquire what people are 'making happen'. Introduces devices to enable talk of the undiscussable (face/power). The 'interaction' is addressed.

¹⁰ As distinct from 'puzzle' (Revans 1982).

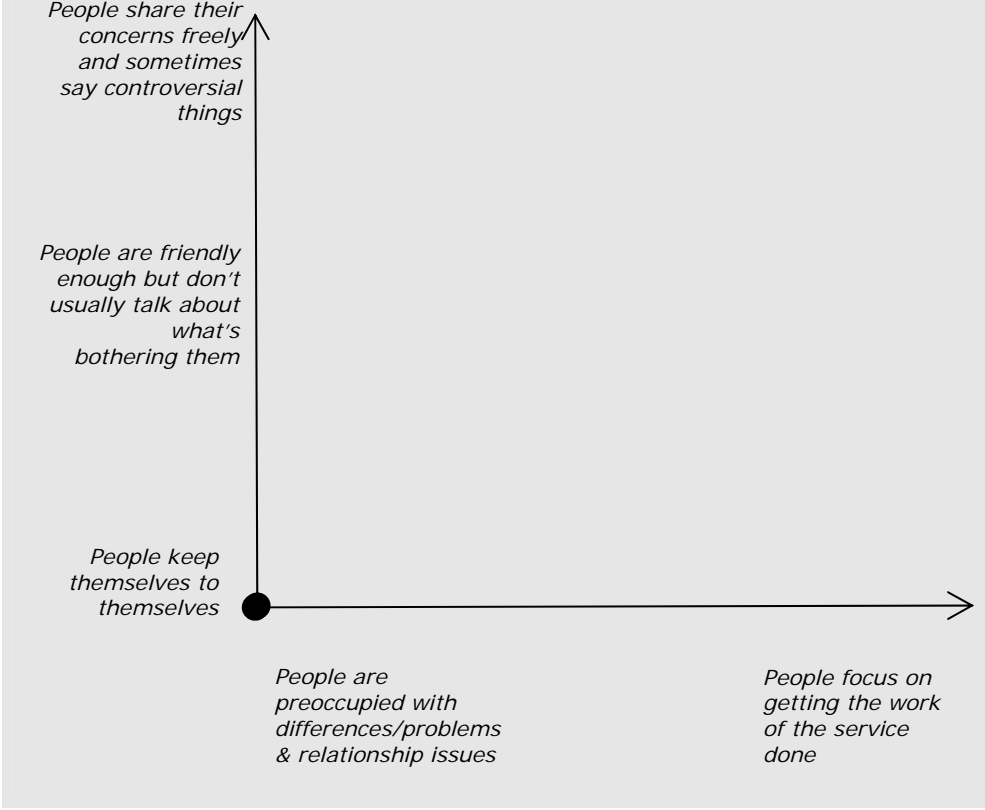
¹¹ Participants may have very different views about the problem and how to talk about it. To some the problem may not exist - but it is still a valid shared problem if it seems to affect some more than others.

APPENDIX A: Conditions for collective learning
Some questions for raising a discussion

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1	<p>When you can see or have experienced a problem with the implementation of a new procedure ...</p> <ul style="list-style-type: none"> a) are you most likely to discuss it with someone higher-up, lower-down, same grade or no-one? b) If it's someone higher-up does s/he work through the implications with you, ask you to do it anyway, leave you feeling you must be getting it wrong? 	
2	<p>When you are undergoing training about new practices and procedures does the trainer (or manager, or partner) welcome your point of view about what might happen or has happened when the new practice is implemented?</p> <ul style="list-style-type: none"> a) If 'NO' - please describe what, then, usually happens b) If 'YES' - please describe what usually happens next. 	
3	<p>Does it feel safe to challenge the views of those with more experience or higher-up than yourself?</p> <p>Can you think when you last did this (a specific occasion)? Make a few notes of what happened.</p>	
4	<p>How do you usually handle it when someone with less experience, lower down the organisation or from a partner organisation challenges your opinion?</p> <p>Can you think of a specific occasion that you think you handled either well - or not so well (if you've got one of each that's fine).</p>	
5	<p>How do 'rules' get made in your team? What happens when rules get challenged or broken?</p>	
6	<p>Is it common in your work/project for people to ask questions about the value of particular procedures and practices?</p>	
7	<p>Without naming them, is there anyone in your organisation/partnership/project who you think is incompetent?</p> <p>If so - what steps do you and others take to appreciate their point of view?</p>	
8	<p>Have you ever felt incompetent in your work?</p> <p>If yes would you like to share a little of how you</p>	

	account for this feeling? (please make a few notes)	
9	How do innovations happen in your organisation/partnership/project?	
10	Have you ever seen someone 'lose face' in your organisation/partnership/project or team? Can you describe what happened?	
11	When decisions are made that about working practices or users/carers lives are the people they affect (staff or user/carers) usually present? Can you give a typical example - did they influence the outcome?	
12	What happens when people make a mistake in your organisation/partnership/project? Can you think of a specific example?	
13	How important is 'formality' in the way people engage with each other in your organisation/partnership/project? Does it seem like there's a 'right way' or is behaviour more relaxed?	
14	Have you ever managed to get a procedure or practice changed? If you have an example - please make a few notes.	
15	Do you prefer it when a more senior manager or partner a) tells you what to do or b) offers you support to make your own sense of a situation? Can you think of an example(s) where either a) or b) has worked well for you?	
16	Have you ever been tempted to do something differently - not in accordance with the policy, plan, procedure or accepted practice? Did you talk about this with colleagues or keep it to yourself?	
17	Do changes of policy and practice usually come from Statutory bodies, or senior management?	

	Can you think of any exceptions to this - front-line staff, users, carers?	
18	<p>Are people who have been doing the job longer - or are higher up in the organisation/partnership/project - nearly always right?</p> <p>Can you think of any exceptions?</p> <p>How did this affect the way decisions are made?</p>	
19	<p>Plot your organisation communications climate on this simple chart:-</p> 	

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