North West Cross Institutional Action Learning (NWCIAL) Developing Women's Leadership

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Background

Meriel and Tracy are members of the North West Higher Education Staff Developers Group, (NWHESDG) which supports the continuous professional development of academic and professional services staff to enable organisational effectiveness. Through our network we proactively engage in action learning, collaborative development projects, share good practice, resources and expertise all with the purpose of enhancing our staff development community.

At a NWHESDG network meeting in March 2015 with colleagues from other North West universities we were discussing our own experiences and that of other staff from our universities who had participated in various leadership development programmes. A common theme emerged around building supportive relationships with peers to assist with problem-solving. Yeadon-Lee (2015:262) posits that "Action learning (AL) as a collaborative approach to learning, arguably, is an example of the power in collective effort, and as such has become an invaluable part of management education" and indeed our participants had expressed the added value of this type of support and the desire to continue involvement in *action learning* to underpin leadership and management development and career progression.

One particular programme that had inspired participants was the Aurora Leadership Development Programme delivered by the LFHE (currently merging with the Higher Education Academy and the Equality Challenge Unit to form a new agency, Advance HE). All participants who had experienced the Aurora programme had found it invaluable for networking, developing relationships, building their leadership capability and changing practice through exploring differing perspectives. They welcomed having the opportunity to engage in non-judgemental, confidential conversations with peers across the sector and had found the action learning component invaluable. In view of this, we agreed that a cross-institutional action learning opportunity would not only enable continuation of the benefits for Aurora alumni but we could also open up the opportunity to others. Whilst the collaborative nature of the initiative would serve to strengthen the relationship of members of the NWHESDG to grow and learn together by developing and disseminating an innovative way of supporting the development of female leaders; it would also impact on our shared external organisational development drivers such as the Equality Challenge Unit's Athena Swan and new Gender Equality Mark. [1]

Our intention was three fold. Firstly, to offer an efficient intervention (HRD professionals are faced with the growing challenge of increasing the capabilities of their leaders with less time and less resources (Bennis & Nanus, 1997; Linsky & Heifetz, 2002; Lojeski, 2010)) that transcended the traditional leadership training course. One which would help participants develop their leadership behaviours through the acquisition of critical questioning and reflective habits. Mintzberg (1973) argues that managers learn on their feet in the day-to-day enactment of their managerial roles. However, this on the job learning needs to be accompanied by some inquiry into experience, an inquiry that seeks to frame meaning and judgements and that leads to thoughtful action (Dewey, 1938; Flanagan, 1997; Kolb, 1984; Raelin, 2000). It is only more recently, however, that action

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[1] https://www.ecu.ac.uk/equality-charters/charter-marks-explained/athena-swan-and-gender-charter-mark/

learning has become a popular tool for developing leaders (Marquardt, 2011; Marquardt, Leonard, Freedman, & Hill, 2009; Pedler, 1997, 2011).

Our programme was offered to those that had previously been identified as having potential, hence their prior selection for external leadership programmes. Smith (2001) expressed that if those with high potential in organisations are to learn and adapt successfully they need to be willing to continually explore and question their supposition by surfacing their insights and evolving fresh questions. Similarly, Marsick and Watkins, 1990 also observed that reflection must involve bringing one's assumptions into consciousness and vigorously critiquing them rather than simply thinking back over what worked and what did not work.

Secondly we wanted, as practitioner members of the NWCIAL Team, to develop our scholarly practice and keen to utilise the suggestions of Lombardozzi (2013) by: developing and applying key guidelines for the practice based on theory and research and using specific theory and research to frame the approach in the initiative.   As Lombardozzi (2017:248) suggests, a development dilemma that we wished to overcome:

> "In contemporary work environments, a professional's learning and development is not relegated to formal courses and programs. Development of new skills is often encouraged "in the flow of work." In other words, there is an expectation that people will develop knowledge and skills while doing the day to day work of the organization (Hagel, Brown, & Somoylova, 2013). In addition, there is relatively little support for practitioners to actively demonstrate a scholarly approach; they risk being seen as too academic (Lombardozzi, 2013). So here we have a dilemma. Practitioners may see the value of grounding their approaches in theoretical frameworks and research-based recommendations, but they are not likely to be given sufficient time and support to build their scholarly background. They may pursue graduate programs or other advanced studies in human resource development (HRD) and related fields, yet their academic knowledge may be perceived as impractical. Practitioners must, therefore, find ways to integrate development of scholarly practice with deepening their experience in chosen areas of specialty so that their portfolios of results and their skill sets mature in parallel."

Our dilemma is also observed by Short (2006) where he suggests that academic and business mind-sets are too often seen as incompatible with one another; scholarly practitioners are told to keep their academic theories to themselves and often feel that in the extreme pace of day-to-day work, they hardly have time (or support) to explore the specific theory and research that might prove helpful.   In a similar vein Hagel, Seely Brown, & Davison (2010) recognise that practitioners need to be willing to go to the "edge" where new ideas are being born, and they need to develop skill at bringing these ideas into practice (Tyler, 2009).

Thirdly, we hoped to develop a community of practice that could be nurtured over time and involve both practitioners and participants working together to identify sustainable approaches to leadership and other development themes, across the UK HE Sector.

Targeted support

Action Learning (AL) sets were aimed at female staff. We worked to establish a consistent approach to the initiative, with a website and communications, marketing, recruitment and delivery strategies to support the programme. A pilot cohort (Phase1) commenced in October 2015 comprising 42 participants working in academic and professional services roles, who registered to join the NWCIAL

initial programme from seven universities including: Chester, Cumbria, Huddersfield, Liverpool, Liverpool John Moores, Manchester and the University of Central Lancashire. Each university set their own criteria however the offer was targeted at women in management, senior administrative, lecturer and senior lecturer positions and Aurora alumni. Action Learning Set facilitators were all Organisational Development/Staff Development professionals from participating universities and it was agreed that facilitators would rotate between sets. At each session set members were able to raise and discuss challenges, problems and opportunities they were currently facing and the sets worked together to question and coach their colleagues to determine their own options for resolving the challenge, problem or opportunity.

Action Learning Set meetings were held at all of the universities within the partnership to encourage participants to visit and broaden their knowledge and understanding of other regional universities. The Phase 1 Action Learning sets met four times between October 2015 and June 2016. A key advantage of a spaced program is that it allows team members to integrate and practice new skills between sessions (Marquardt et al., 2009).

Learning insights from Phase 1

One of the key advantages we found running a programme with colleagues from other universities was the participants being exposed to a variety of differing perspectives and the chance to gain insight into practice from a range of organisations.

Action Learning Set members said they felt less constrained when they were with people who they didn't know or work with as they felt able to express themselves more openly about work-related issues.

Participants reported many benefits including:

➢ Setting realistic goals
➢ How to approach issues from different perspectives
➢ Issues can be shared to be solved
➢ Improved questioning skills
➢ Resisting the urge to suggest a solution
➢ Increased confidence
➢ Learning to listen and reflect
➢ Finding a flexible approach to solve problems

In an evaluation exercise, participants were asked: *"Please describe in one word any ways in which the programme has enabled you to improve or develop?"*

Participants' responses included:

AL set facilitators also reported personal and professional benefits from their involvement with the programme. The most obvious was the chance to practice Action Learning facilitation skills. In addition, as the facilitator role rotated, there was additional insights gained from hearing multiple issues, intended actions and resolutions, by participants, broadening the facilitators' understanding of the breadth of challenges that exist within universities. Facilitators were asked to evaluate their experience in a word:

To build on the success and impact of the pilot cohort, Phase 1, we started a second cohort, Phase 2 in October 2016.

LFHE funded Small Development Project for the HE Sector

During Phase 1 other regions started to express their shared interest in our AL initiative. We decided to capitalise on our time invested in developing the pilot AL programme and further developed the NWCIAL website with AL reference materials for participants.

In our ethos of sharing practice in January 2016 we submitted a successful bid for funding for a one year Small Development Project offered by the Leadership Foundation for Higher Education (LFHE). The aim of the project was to contribute to the "Productivity agenda and capacity building" theme with the intention of developing capacity to bring about instrumental change in universities sector wide.

Our goal was to create **ACTION: a good practice online resource guide to Action Learning in HE.** We formed a project team from the existing partners and appointed a Project Lead, Tracy Ellis, University of Liverpool, OD Adviser and IT expert. Tracy had developed our NWCIAL website for Phase 1 assisted by apprentice Sophie Stansfield.

We utilised a methodology that would enable a consortia of universities to deliver sustainable cross-institutional action learning to "enhance our networks and communities of practice to enable greater peer support and challenge which would also create development opportunities that are bespoke for specific communities of learners". We intended that the online resource would be a useful guide for higher education colleagues across the UK and Ireland who wanted to deploy a similar initiative to supplement existing LFHE and/or regional development interventions.

We adopted a project management approach taking it step by step to maximise the likelihood of embedding and sustainability and appointed an external evaluator, Beverley Agard-Owen, Swansea University to demonstrate impact and disseminate both the successes and challenges of our Action-Learning/Action Research project.

The Post-it™ Method was introduced by one of the project team members. To ensure consistency in our approach all the facilitators were trained to use this method. The Facilitator was responsible for setting and agreeing the ground rules and confidentiality within the set, allocating and managing the set, scheduling time slots according to the time available and number of presenters, assisting with the questioning process to help it run smoothly and only intervening if presenters were being bombarded,

interrogated or other unhelpful behaviour was displayed by other set members, preventing the presenter finding their own way to committing to an action or follow up actions back in their workplace. After the presenter finished, the facilitator invited set members to offer questions. Each member responded by writing one question per Post-it™ note, read out the question then handed it to the presenter.

Using Post-it™ notes helped set members to prepare questions as the set member/presenter told their story and then enabled the presenter to organise the questions to help them group, prioritise, categorise, discard, prepare their responses or choose to answer any questions that set members asked for clarification purposes, as appropriate. This included factual details that helped set members formulate useful questions.

Set Members supported and challenged presenters appropriately, helping them to explore their issue. They asked questions with a focus on trying to provoke insight for the presenter rather than solely seek clarification. The set members learnt to avoid "telling" and "advising" the presenters.

It was a simple, yet powerful method that enabled presenters to continue to review and reflect on the questions posed following the set meeting. Mutual learning took place during the set meetings as questions were posed and answered; following the meeting members, revisited their experience and explored it in greater depth in a process of continuous learning.

Evaluation approach

As the North West Cross Institutional Action Learning (NWCIAL) Programme was a pilot it was important to measure its effectiveness.

Derven, 2012; Kirkpatrick & Kirkpatrick, 2011 suggests that business-savvy HRD practitioners have a habit of measuring results. In addition to eying the business outcomes, successful HRD practitioners set up systems to monitor their own projects' outcomes during rollout and implementation, as well as over the long term once a project is complete.

With this in mind, we used Kirkpatrick's Four-Level Training Evaluation Model (1994). This helped us to prepare an evaluation strategy that objectively analysed the effectiveness and impact of the programme, to prepare for improvements for the future and for sharing our findings in the Good Practice guide and included stages:

1 Reaction

At this level we aimed to measure how the set members reacted. Did they believe that the action learning programme was a valuable experience? How did they feel about the location venues, facilitation, topics covered, format, communication and the overall presentation?

It was important to measure reaction, because this would assist in understanding how well the programme was received by the set members. It also helped to determine where to improve the programme and identify any factors that might be missing from the programme.

Examples of the questions used were: "Were your expectations met?" and "Was there anything that exceeded your expectations?"

2 Learning

At level 2, we wanted to measure what the set members had learned. How much had their knowledge increased as a result of the programme?

When planning the action learning session, we started with a list of specific learning objectives: these were the starting point for our measurement. Of particular interest was the measurement of learning in changes to knowledge, skills, and attitude.

Examples of the questions asked were: "Please detail ways that the programme has enabled you to improve or develop" and "In the context of work, how confident were you after participating?"

3 Behaviour

At this level, we wanted to evaluate how far the set members had changed their behaviour, based on the experience and information gained from their set members. Specifically, how was the learning applied back in the workplace?

It was important to note that behaviour could only change if conditions were favourable. For example, their line manager/ supervisor would not allow them to apply new knowledge in their role.

Examples of the questions asked were: "To what extent do you agree that this change is a result of taking part in the action learning?" and "Please describe how the programme has influenced the way you act and/or your behaviour" and "Please provide an example of how you have, or will in the future, apply some of the learning in practice, back in your workplace."

4 Results

At this level, we analysed the results from participants' engagement in the programme. This included outcomes the set members determined to be good for their institutions and good for their university staff and colleagues with whom they worked.

An example of a question asked was: "In your work context, please rate how strongly you agree or disagree that participation in this programme has enabled you to effect positive change."

Reference: Donald Kirkpatrick, Professor Emeritus at the University of Wisconsin and past president of the American Society for Training and Development (ASTD), first published his Four-Level Training Evaluation Model in 1959, which was updated in 1975 and again in 1994 and more recently (Kirkpatrick & Kirkpatrick, 2009).

Evaluation methods

We developed a range of evaluation methods including:

➢ Verbal feedback after each set meeting.
➢ An online survey questionnaire conducted in November 2015 following the first action learning set in October 2015 (20 respondents)
➢ An in-depth online survey conducted with the facilitators (7 respondents)
➢ An online survey conducted with the participants following completion of the programme (17 respondents)
➢ Telephone interviews conducted with participants some of whom had withdrawn from the programme and others who subsequently provided case studies.
➢ A 4-hour facilitated feedback session at the end of the final action learning set meeting of the programme with 24 members of the cohort. This involved participants providing comments on Post-its™ attached to a "smiley" flip chart.
➢ Three case studies emerged from dialogue with participants.

Some of the common themes of support that emerged when participants were asked to choose a word that described the challenge they brought to action learning were:

Managing-Difficult-People
Line-management-issues Staff-management
Career/job Work-life-balance
difficult-managers
Managing-Difficult-Situations career-development Team-Relationships
Communication Poor-management-practices Work-Relationships workload
Personal-development Career-progression sexism
reorganisation Staff-issues Guidance-issues

Some of the feedback from the online survey in relation to how action learning had influenced mindset or behaviour included some wider learning than had been originally identified. This corresponds with Dotlich & Noel (1998) that 'Other training programs come with stated outcomes; they can be controlled, predicted and charted. Action learning is much less easily controlled or charted.' (1998:16-7) and included:

"It gives you a wider perspective and takes you out of the confines of your own personal work space"

"It has improved my listening and questioning skills. I am also more reflective."

"I am less likely to give advice and use the techniques of action learning to support others"

"A better approach to problem solving, which reduces stress"

"Helped me step outside of myself"

When asked "Have any changes you have made, been commented upon by your colleagues/peers", some of the responses included:

"My line manager and my peers have noted how much more I can identify best practice here and elsewhere and have a better perspective on things."

"I am managing my frustration at not getting things done/changed as a result."

"I was promoted recently."

"My confidence makes a significant difference to my work role."

When asked "please rate how strongly you agree or disagree that participation in this programme has enabled you to effect positive change", 83% of respondents chose agree strongly or agree.

Testimonials provided by participants to describe their experience included:

"An insightful and inspiring programme."

"Action Learning proved to be a gentle but very powerful tool which helped me in both my personal and professional development and through which I made new strong friendships."

"This was a much welcomed and positive experience. My set are planning to continue which I think is a sign of success of the initiative"

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

The full evaluation report, case studies and guidance information sheets can be accessed at: www.highereducationactionlearning.co.uk

Conclusion

Our cross-institutional action learning sets presented a captivating method to enhance participants' learning and development, and, in a similar vein to interventions such as coaching it is clear that there are both tangible and intangible benefits (Harding et al, 2018).

Outcomes have included:

A sustainable cross institutional action learning programme with over 100 women participants at the time of writing.

A recognition by practitioners involved that there is value in engaging collaboratively in scholarly activity. Our scholarly journey started with the exploration of action learning theory to explore possibilities and devise our own adapted methodology; publication of ACTION: A good practice guide; followed by dissemination of our work at three conferences: NWCIAL Mini Conference, University of Liverpool, May 2017; SDF Conference, Birmingham, November 2017; Aurora Conference, London, June 2018. The project has also given rise to a strong supportive partnership between the individuals involved, we now have a further cross institutional initiative now under development to support leaders via coaching.

We are in agreement with Lombardozzi's view that,

"Scholarly practice makes one's mental view of the organization simultaneously more faceted and more well-defined, so we can liken scholarly practice to a clear lensed kaleidoscope—one that points to objects in the real world and—with its angled mirrors—gives a patterned, kaleidoscopic view of those objects. In one sense, the view through the kaleidoscope is distorted; in another sense, it is quite fascinating, allowing the viewer to see real people and objects, but in a whole new way. By grounding practice in theory and research, and approaching practice with a scholarly mind-set, practitioners multiply the lenses through which they see the organization and are more likely to notice patterns and perspectives that were hidden before."

Three of the sets from cohorts 1 and 2 are still meeting and 25% of those involved report that they have maintained supportive relationships with members of their set. This has provided us with welcome evidence that there are additional longer term benefits of this type of intervention.

The dedicated website developed to share our work has provided the resource for other HRD professionals to set up and run a similar project in the future. The North East regional collaboration of HE universities has followed our lead and now run cross institutional action learning using the same methodology.

Some tangible outcomes reported from participants have included:

> "I have made changes that have resulted in reduced workload for students and staff, without compromising achieving the learning outcomes. The action learning gave protected time to think about this problem that was causing me daily stress. The non-judgemental presence of the group helped me explore and come up with a variety of options that eventually led to the changes implemented"

> "The way I respond now has changed the behaviour of my team. I am now getting the best from my team. I realised that I cannot change their feeling towards work but can change the way I manage"

> "I have a much better work life balance. I have moved into a new role undertaking inspections for the Care Quality Commission. This allows me to work part time at the university or change roles entirely in the future".

> "I have been promoted as a result of the support I received from my AL set"

In November 2017 we were delighted and proud to receive on behalf of the NWCIAL project team, a **'Delivering Excellent Practice'** national award presented by the HE Staff Development Forum and Good Practice.com in recognition of our innovative development interventions that have impacted sector wide. As a result of our initiative we have enhanced our professional network and community of practice. HEI's in Scotland and South Wales have also adopted our approach and the online HE Good Practice Guide **ACTION** is being used in student programmes.

The next step is to expand our pool of action learning facilitators to grow the provision further. Six academic participants have responded to this call and arrangements are being drawn up to provide facilitator training. This is encouraging and will hopefully lead to greater advocacy of action learning and fostering of scholar/practitioner relationships.

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Disclosure statement

No potential conflict of interest was reported by the authors.

Notes on contributors

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