Barriers to Action Learning in the United States

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Barriers to Action Learning in the United States

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This study investigates the contribution barriers to Action Learning play in limiting its use in United States organizations. Reviewing literature on current practices identifies barriers to Action Learning. Seven hypotheses are tested to determine if there is a significant difference between the practices used in US Action Learning programs versus similar programs in non-US organizations. Results of a survey administered to a sample of Action Learning practitioners did not substantiate any of the seven hypotheses.

Document Type
Thesis

Degree Name
MS in Human Resource Development

Department
Education

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Third Supervisor
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Subject Categories
Education

This thesis is available at Fisher Digital Publications: https://fisherpub.sjfc.edu/education_ETD_masters/175
Barriers To Action Learning
In The United States

Christopher Comparetta

April, 2001
Barriers to Action Learning in the United States

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A Paper in Human Resource Development

Submitted in Partial Fulfillment of the Requirements for the Degree of

Master of Science in Human Resource Development

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Acknowledgements

I would like to thank Dr. William Rothwell who introduced me to Action Learning as an alternative approach to Organization Development. I would like to thank Judy O’Neil of IFAL-USA and Peter A. C. Smith of IFAL-Canada who provided the ever-important e-mail addresses for their respective members in addition to ongoing encouragement. The electronic survey used in this study would not have been possible without the expertise and assistance I received from Dr. Jean Maley. Last, and certainly not least, I would like to thank Dr. Marilynn Butler for her encouragement and support, not only throughout this project, but also during the 3 years that I have been a student in the Human Resource Development program at St. John Fisher College.
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Chapter 1

The purpose of this study is to determine the role that barriers to Action Learning play in minimizing its use in US organizations. Barriers are identified by reviewing current literature on Action Learning practices. This study is organized in 5 chapters. The first chapter is an introduction to Action Learning and the problem being investigated. Chapter 2 is a review of Action Learning literature to identify success attributes and barriers to Action Learning programs as identified by current practitioners. Chapter 3 describes the design of the experiment to test 7 hypotheses with the results presented in Chapter 4. The final chapter is a summation of conclusions drawn from the results of the experiment.

Introduction

In today’s business environment change is preceding at an unprecedented rate. This rapid change rate is causing some companies to operate on the verge of chaos. With increased global competition and technology advances that have corporations operating at the ‘speed of the Internet,’ many organizations are continuously in a state of flux. Responding to this situation results in continual changes to business processes, policies, and procedures, which creates new learning requirements for employees. As the competitive pressures increase, more learning must occur in less time. Therefore, a major problem is that it becomes extremely difficult to stop or slow down to allow the employees to acquire new skills or to learn new competencies. It has been proposed by prior literature (Dilworth, 1998b; Marquardt, 1999; Revans, 1998), that the problem of continual learning in a rapidly changing environment can be alleviated with the use of Action Learning. Marquardt (1999) defines Action Learning as

... both a process and a powerful program that involves a small group of people solving real problems while at the same time focusing on what they are learning and how their learning can benefit each group member and the organization as a whole. (p. 4)

Long cycle times involved with the Action Research model make it a less appropriate tool for
organization development in corporations that are in need of rapid and continual change. On the other hand, Action Learning, which provides a more rapid method for increasing an organization’s knowledge holds the promise for quick payback in firms that are constantly seeking new ways of doing business. Dilworth (1998b) reinforces the value of Action Learning during periods of rapid change by stating that it is “a way to improve performance, promote learning, and position organizations to adapt better in turbulent times” (p. 28).

Given that Action Learning is effective in dealing with rapid change and that many organizations are constantly reinventing their markets and themselves in the process, we should expect to see evidence that these firms have embraced this method of organization learning. However, Action Learning, although several decades old, and in popular use in many European countries has not gained widespread use in the US. Marquardt (1999) notes that “despite its power, simplicity, and cost-effectiveness, Action Learning is still rarely utilized within American organizations” (p. 4). Raelin (1997b) also observed in a recent article that Action Learning is only now “starting to take hold in North America” (p. 368).

Purpose

The lack of widespread use of Action Learning in the US (Marquardt, 1999; Raelin, 1997a; Raelin, 1997b), when its application seems not only appropriate but also desperately needed in these trying and chaotic times, leaves the question of what factors may be preventing its acceptance. It would be useful to understand what these factors, or barriers to Action Learning, are so that one may take steps to counteract with the intent to increase its use. An example of a barrier may be American culture’s preference for discussion or debate versus dialogue (Bierema, 1998), the former being a means of advocating one’s position while the latter is a way to build greater understanding. Another barrier may be the practice in the US of limiting Action Learning only to early high-potential candidates. The purpose of this study is to investigate how Action Learning is applied in US organizations compared to organizations in
other countries. Specifically, this paper will look at potential barriers to the use of Action Learning in US organizations, where the source of these barriers may either originate in American organization culture or may be a result of how Action Learning is applied by US practitioners. A review of current practices will be employed to identify both attributes that lead to successful implementations and barriers that practitioners believe have prevented the full realization of the benefits of Action Learning. It is proffered that the absence of the successful attributes can be a barrier to successful Action Learning programs.

Background

Most Action Learning scholars attribute its creation to Reginald Revans. Early influences on Revans’ work on Action Learning came from his days as a graduate student in the Cavendish labs in England. As a student, Revans was able to observe several of the greatest physicists of this century, such as Einstein, Thompson (isolated the electron), and Rutherford (split the atom). It was customary for Rutherford, as the head of the lab, to hold a weekly session where each of “the researchers - each engaged in their own project – would meet together to discuss progress or lack of it” (Barker, 1998 p. 12). As each researcher presented their work, they were subjected to an intellectual inquisition. Many of the questions from the audience focused on why the researcher took the particular course of action. This barrage of questions caused the presenter to reflect on what caused them to take a particular approach. During these sessions Revans observed how the researchers “shared their problems, questioned each other, and received support from their group” (Marquardt, 1999, p. 18).

From these early observations, Revans developed the belief that in order for learning to occur, it is not enough to rely on existing knowledge. Rather it was essential for the learner to understand what they didn’t know. That is, the learner must come to grips with their own ignorance. This led to Revans’ formula for learning as L = P + Q, where ‘P’ refers to programmed, or existing knowledge, and ‘Q’ refers to questioning insight. Questioning insight
provides the mechanism for uncovering what one doesn’t know about a problem.

After leaving the Cavendish Labs, Revans pursued a career in municipal administration and management, starting in education administration and training, then moving to the coal fields to assist with the nationalization of the British coal industry. It was during his work with the coal industry where Revans first applied the constructs of Action Learning by creating teams drawn from the ranks of the colliery managers. Contrary to the popular practice of engaging management consultants for advice, or ‘P,’ Revans shunned external experts. Rather he stressed that these colliery “managers would learn more from each other” (Barker, 1998, p. 15) than from those who had not worked in the coal fields. During the mid-50’s, Revans created the first Action Learning program for use in the coal industry. This program created the environment whereby learning could flourish. In addition to the requisite programmed knowledge and questioning insight, Revans also went about creating the spirit of comradeship and support that he had observed in the Cavendish labs and also at the bottom of the coal mines. This comradeship would become an essential element of a supportive learning environment that is created in an Action Learning Set.

In this chapter, the purpose of this study has been outlined plus a brief overview of the birth of Action Learning. In the next chapter a review of the literature authored by current Action Learning practitioners and by Reginald Revans will be undertaken to identify potential success factors, the absence of which would prove to be a barrier to reaping the full benefits of an Action Learning program.
Chapter 2

The purpose of this study is to determine the role that barriers to Action Learning play in minimizing its use in US organizations. Barriers are identified by reviewing current literature on Action Learning practices. The prior chapter served as an introduction to Action Learning and the problem being investigated. This chapter presents a review of Action Learning literature in which practitioners identify success attributes and describe likely outcomes when these are missing from an Action Learning program. These success factors, the absence of which could become a barrier to reaping the full benefits of an Action Learning program, are used as the basis for the development of the hypothesis that there is greater presence of these barriers in US organizations than in non-US organizations. It is believed that these barriers have been contributing to the slowness of the spread of Action Learning in the US.

Early Successes with Action Learning

Following his experiences in the coal fields during the 50’s, Revans, through his role as the first professor of business administration at the University of Manchester, began introducing Action Learning to other industries during the 60’s. By the end of the 60’s, the many successes of Action Learning started to gain notoriety and international prominence as a vehicle for dealing with organizational problems. In 1967 Action Learning gained the attention of George F. Lombard, who was at that time the Dean of the Harvard Business School (Barker, 1998). By 1971, “Action Learning circumnavigated the globe” (Revans, 1997, p. 3). In the 30 years since Action Learning “circumnavigated the globe” there have been numerous and well published successes.

Part of the success of Action Learning in organizations can be attributed to the types of problems that organizations have to deal with. Marquardt (1999) categorizes organization problems as being either technical or adaptive in nature. Technical problems can be solved by the application of existing or programmed knowledge. Adaptive problems on the other hand are new
problems, which have not yielded to pre-existing knowledge. Marquardt (1999) proffers that “Action Learning contains a well-tested framework that enables people to effectively and efficiently” (p. 4) deal with these adaptive problems. Revans described the purpose of Action Learning in dealing with these types of problems as the following:

Action Learning is to make useful progress in the treatment of problems/opportunities, where no solution can possibly exist already because different managers, all honest, experienced and wise, will advocate different causes of action in accordance with their different value systems, their different past experiences and their different hopes for the future. (Revans, 1998a, p.28)

Adaptive problems can be thought of as systemic problems. Systemic problems are unlike the typical cause and effect problems. Cause and effect problems usually have a clear linkage between the elements of the problem. Systemic problems do not have a clear linkage in that the multiple relationships in a system interact to cause different events to occur at different times. Often the cause is removed from the event by both distance and time. According to Dean (1998), Action Learning is well suited to solving real, systemic, and yet unresolved problems by seeking fresh insight into what is not already known about why the problem exists in the system. Botham and Vick (1998) describe the Action Learning process as providing a partnership in learning when expertise is not available to provide solutions. Dixon (1998a) describes the Action Learning process as a means to address systemic problems without the need for experts. Rather these systemic problems facing organizations require “making sense of a great deal of confusing information and multiple perspectives” (p. 45-46).

The process employed with Action Learning usually involves removing the participants from their daily work life and its associated surroundings. In addition, the Action Learning set is made up of people who are dealing with similar problems or attempting to solve a common problem. By its nature then, Action Learning creates the “space and time” (Weinstein, 1998, p.
158) necessary for learning in addition to creating an atmosphere of comradeship. This
environment enables supporting, caring, challenging, and questioning behaviors necessary for
people to work together to resolve organizational issues, the type that are besetting many
organizations in today’s chaotic world.

Uses of Action Learning

An Action Learning program is unique in that it provides a combination of comradeship,
personal and group learning, and action to deal with a problem or opportunity. This combination
of traits has enabled Action Learning to be used in different applications. According to
Marquardt (1999), Action Learning is commonly used in (a) problem solving, (b) teambuilding,
(c) personal development, (d) leadership development, and (e) organization development.

Problem solving

Revans has stated, “Action Learning deals with the resolution of problems (and the
acceptance of opportunities) which no single course of action is to be justified by any code of
programmed knowledge” (Revans, 1998, p.6). Organizational problems of the type that
Marquardt refers to as adaptive tend to be tough because there is no existing knowledge available
to apply to the difficulty. This can be interpreted to mean there is no known existing solution or
answer. An example of an organizational problem would be how to deal with high rates of
attrition in today’s tight labor market. Obviously, there isn’t a single, known answer to this
problem. Each organization must assess its own predicament and take actions, some which may
work and some that may not.

More often than not there are seemingly several answers or solutions to organizational
problems. Revans had observed this phenomena in organizations and attributed it to “different
managers, all honest, experienced, and wise, will advocate different courses of actions in
accordance with their value systems, their different past experiences, and their different hopes
for the future” (1998, p.28). Revans argues that instead of relying solely upon past experiences,
Action Learning encourages posing questions to tackle these “problems that have so far defied solution” (1998, p. 4) so that a single common path of action can be developed.

**Teambuilding**

Action Learning’s roots in the weekly research presentations at the Cavendish Labs and the miners teams in the coal pits provide the basis for teambuilding. The same comradeship that was evident in the labs or at the bottom of the mines provides the fabric of teams in organizations. This comradeship enables the simultaneous supporting and challenging environment necessary to create a “partnership in learning” (Botham & Vick, 1998, p. 7). Dixon (1998a) suggests that the capacity of people to make sense of the world “is greatly enhanced when people work together, rather than individually” (p.46) further supporting the use of Action Learning as a vehicle for teambuilding in organizations.

**Personal development**

Action Learning supports personal development by encouraging all members of the team to learn through the use of reflection. Marquardt (1999) describes reflection as “recalling, thinking about, pulling apart, making sense, and trying to understand” (p. 29). It is during this process of questioning and reflection that individuals in the group can experience personal growth. In this regard, personal development comes from a person’s understanding, or learning, about themselves, including their assumptions which have caused them to take prior actions.

**Leadership development**

Revans (1998a) states that the use of questioning insight is “exercised by leaders, while P is deployed by experts” (p.29). This statement can be extrapolated to be leaders use questioning insight while managers use programmed knowledge. In much of the literature regarding the differences between leadership and management (Heifetz & Laurie; 1997, Kotter; 1990, Kotter,1995; Kotter, 1996; Kouzes & Posner, 1995) leadership is described as moving an organization to a new place while management is described as applying existing rules, policies,
and procedures to ensure stable and predictable outcomes. Therefore, to move a person from a management role to a leadership role requires that the person comes to be comfortable with questioning actions, specifically their own. Action Learning is well suited to provide and promote the personal questioning to begin the movement from manager to leader. This is why one of the prominent uses of Action Learning is with leadership development and is often deployed as part of a Hi-Pot (High Potential) or Fast Track program for individuals identified as assuming leadership roles early in their careers.

**Organization learning**

With the increased interest in organization learning generated by the publication of “The Fifth Discipline” (Senge, 1990), Action Learning is being applied as a means to create new organization knowledge. According to Senge,

> It is no longer sufficient to have one person learning for the organization . . . The organizations that will truly excel in the future will be the organizations that discover how to tap people’s commitment and capacity to learn at all levels in an organization. (p. 4).

During an Action Learning Set, organization learning occurs amongst each individual participant. As described in the use of Action Learning for personal development, all members of the organization that participate in an Action Learning activity learn about themselves in addition to learning how to learn. This focus on individual learning then contributes to the overall organization learning.

**Renewed interest in action learning**

Although the first Action Learning program was conducted in the mid-50’s, there appears to have been a revival in the 90’s. A review of the literature on Action Learning reveals a renewed interest driven by the rapid rate of change in today’s world (Dilworth, 1998b; Marquardt, 1999; Revans, 1998). Revans (1998) suggests that “In an epoch of rapid change,
those organizations unable to adapt are soon in trouble, and adaptation is achieved only by learning . . .” (p. 3). Dilworth (1998a) suggests that there are several motivators for the recent interest in Action Learning, all related to change in the workplace during the 1990’s including: the growing shift to self directed work teams, emphasis on empowerment of workers, complexity of work routines, need for continuous learning, globalization, focus on quality, the flattening of organizational hierarchies, renewed interest in participatory management and the goal of elevating the learning and adaptive capacities of individuals, teams, and organizations. (p. 5)

Dilworth (1998b) also argues that “Change now tends to outdistance our ability to learn” and “Only by improving the learning capacity of organizations can we deal with change dynamics” (p.34). Marquardt (1999) also attributes change as a driver in the renewed interest in Action Learning, caused by “technology and globalization” (p. 3). As a result of this constant state of change, “Organizations and individuals must continually adapt if they seek to participate in creative and meaningful ways with their changing environments” (p. 3). This rapid and constant change creates problems that must be solved with actions. However, just actions alone will only address the tactical aspects of the problems. To deal with the strategic nature or root cause of the problem requires learning. Dilworth (1998b) refers to this duality of Action Learning,

Therefore the employment of Action Learning is strategic rather than tactical. You need fresh thinking if you are to avoid responding to yesterday’s challenges as today’s problems and tomorrow’s opportunities engulf you. (p. 35)

Action Learning which deals with both action and learning then is ideal for equipping an organization with the capability to handle both tactical and strategic nature of problems, or as Marquardt (1999) stated, Action Learning enables “fighting the alligators and draining the swamp at the same time” (p.3).
Action Learning then is very well suited to dealing with changes. Revans espoused that “The wisdom inherent in Action Learning is even more important in dealing with rapid changes in today’s world” (in Marquardt, 1999, p. x). Dilworth (1998c) also argued Action Learning could provide organizations with the constructs to better respond to change through learning. Garratt (1997) contends that “learning is equivalent to change” (p. 17). He compares the survival of an organization to the survival of any organism in a rapidly changing environment. Only the organisms that quickly adapt to the change will survive. Garratt suggests that if the change is greater than the learning, the organization will perish. Only if the learning is equal to or exceeds learning can an organization survive in a changing environment. Action Learning can provide the vehicle for an organization to deal with rapid change.

Action Learning encourages and nurtures learning by focusing on “fresh questioning and reflective insights that can result in valuable new learning for the individuals, the group, and ultimately the organizations” (Marquardt, 1999, p. 29). As we have seen from Revans (1998) work, attempting to solve tomorrow’s problems with yesterday’s solution may no longer be appropriate. Today, this rapid rate of change creates new problems requiring organizations to move beyond reapplying prior knowledge and experiences. Many organizations have difficulty adapting to these changes because they maintain “rigid and highly-defended thought patterns, patterns which leave individuals less able to adapt to changing conditions and less able to change themselves” (Dixon, 1998a p. 50). Action Learning can help organizations overcome these patterns of behavior and thinking by encouraging set members to question their assumptions and work processes as a means of generating new information. Garratt sees this as part of Action Learning’s role in organization learning, for if the set members “can be seen to change when faced with authentic information which questions their operating assumptions, then the change in organizational attitudes will disseminate rapidly through the organization” (1997, p. 17).

Characteristic of a new, never before seen problem is that there is no single solution that
would be evident to all involved parties. This phenomenon can be attributed to each individual bringing a different perspective based on their unique knowledge and life experiences. As a result much of the effort to solve the problem is spent advocating the merits or debating the benefits of the solutions. According to Botham & Vick (1998), “Action Learning is intended to help develop the ability to tackle problems or opportunities of which different persons all experienced, intelligent and motivated, might well advocate different courses of action, all reasonable” (p. 9). Action Learning encourages the set members to understand why they hold a particular position or why they can’t accept another person’s point of view. The understanding, or learning about ones working assumptions, allows the individual to move away from their existing “defensive patterns” and at the same time create the opportunity to generate “authentic information”.

Minimal presence of Action Learning in US

If then, as described, the driver for renewed interest in Action Learning, continuous and rapid change, is all around us and leaves no one untouched, we could expect to see Action Learning widely used. However, in searching for instances of use, it was noticed that much of the interest in, and application of, Action Learning is occurring outside of the US. This seemed odd for several reasons. First Action Learning was developed in England so language barriers should be minimal. Action Learning was first brought to the US in 1967 by Dean Lombard, then the Dean of the Harvard Business School (Barker, 1998 p. 17), only 10 years after the first Action Learning program. Therefore Action Learning has been present in the US for some 34 years. With the escalating rate of change in the 90’s, and no let up in sight, one could expect Action Learning to be firmly rooted in US organizations. However, that is not the case. Marquardt observed (1999), “despite its power, simplicity, and cost-effectiveness Action Learning is still rarely utilized with American organizations” (p. xvi). It appears that Action Learning has not enjoyed the widespread use as it has in Europe, Canada, and Australia. In his
article comparing Action Learning to Action Science, Raelin (1997a) notes that Action Learning is “most practiced in Europe” versus Action Science which is “most practiced in the US” (p.21). Raelin (1997b) also observed that Action Learning is just “starting to take hold in North America” (p. 368). These observations lead one to ask why isn’t Action Learning more widely used in the US.

US versus non-US Forms of Action Learning

Some Action Learning practitioners who have noted this phenomena in use attribute some of the explanation to the different ways Action Learning is practiced in the US as opposed to other nations. Marsick and O’Neil (1999) noted that there was a difference between Action Learning program designs between the US and England. Dixon (1998a) also noted this variation, referring to the mode of Action Learning practiced in the United States as an “Americanized version” (p. 45). Marquardt (1999) stated that “Action Learning as publicized in the US barely resembles the classic Action Learning as developed by Reg Revans and others earlier in this century” (p. xi). He attributes the deviation from the classic form of Action Learning and subsequent poor results as a major contributor to its lack of use in the US.

Marquardt proposes that a potential reason for the mutation from the classic form is that “Americans tend to focus on quick, short-term efficiency rather than long term effectiveness, on urgent activities rather than important actions” Therefore, there is a lack of emphasis on the learning so the full richness of Action Learning is never experienced. Others have noted this emphasis on action and de-emphasis on learning in US applications of Action Learning. Dixon (1998a) noted that “Action Learning, as it is often implemented in the US, differs little from a typical task force” (p. 44) that is focused on problem solving and taking action. She goes on to state that those elements of Action Learning that can bring about the most change in organizations and set participants are absent in the Americanized version. She describes one example in GM where the participants downplay the importance of reflection and development
because it is seen as taking focus away from work rather than viewed as an integral part of work. Dilworth (1998c) has also noted that “reflections can be the first thing to fall by the wayside as energies become fostered on task accomplishment” (p.21).

As further evidence of the difference of Action Learning forms between the US and non-US nations, some American practitioners are publicly advocating the emphasis on action versus learning. Lanahan and Maldonado (1998) tout the modifications to Action Learning which made it more like a task oriented problem solving. Learning then was treated almost as an afterthought as part of “conducting a post-working debriefing session” (p. 84) stating “It works . . . we have seen groups rise to the challenge, performing well under pressure to produce excellent results in a compressed time frame” (p. 85). So here the emphasis is on results not learning, and compressing time, assumedly by eliminating in-process learning.

The issue of the emphasis on learning seems to be a predominant observable differentiation between US and non-US versions of Action Learning. Rothwell, a US practitioner, writes in “The Action Learning Guidebook” (1999), that problem solving to meet business needs and developing people (i.e. learning) are equally important, which is different from Revans’ model that espouses that learning is to be a priority over the solving of the problem. Perhaps this is because, as Marquardt (1999) suggests, American managers tend to be action oriented with an emphasis on bottom line results. That is, American organizations may focus more on the tactical than the strategic which can perhaps be linked to the influence of Wall Street - just look what happens when a company reports a bad quarter. These action-oriented managers also tend “to think of learning as separate from work. The ‘Q’ process, questioning insight, is often seen by managers as the stuff of philosophers or, worse, idle dreamers” (Dixon, Hales, & Baker 1997, p. 264). This bias to separating out work from learning then could also contribute to the development and perpetuation of an Americanized version of Action Learning.

Other Action Learning practitioner observations that note the difference between US and
non-US organizations, point to how Americans communicate. Bierema (1998) states that
Discussion is the predominant form of discourse in American culture. Generally, discussion serves as a method for advocating ideas with the explicit goal of convincing other colleagues that one idea is superior to another. Discussions are intended to be win-lose competitions. (p. 90).

This predominant form of discourse in US organizations then has the potential to create a differentiated application of Action Learning, which again could dilute the effectiveness contributing to its lack of use.

Yet another reported difference between US and non-US organizations is the way Human Resource departments are organized. Dixon, Hales, and Baker (1997) observed two issues with the structure of US Human Resource departments. The first issue they raised was with respect to roles and responsibilities. Specifically, where does the responsibility for training and learning reside within an organization. They point out that in most US organizations the training organization “is responsible for providing ‘P’ through scheduled courses” (p. 263) and the Organization Development group is responsible for the ‘Q’ through problem solving oriented interventions. This diffusion of responsibility leads to confusion as to who is accountable for the success of Action Learning. They also suggest that because most Human Resource organizations typically are centralized in a corporate function, the nature of the Human Resource Development structure does not provide mechanisms for promoting “the Action Learning concept to line management, whose support would be essential to the successful operation of Action Learning sets at the plant/office locations of the organization” (p. 263). In addition, they state “that the traditional reward system for both the Human Resource Development professionals and the Human Resources department supports the use of ‘P’ rather than ‘Q’” (p.264).

From the cited evidence, many Action Learning practitioners (Bierema, 1998; Dixon, 1997; Dixon, Hales, & Baker, 1997; Marquardt, 1997; Raelin, 1997a; Raelin, 1997b) have
noticed a reduced use of Action Learning in the US when compared with other nations. Some of these practitioners have attributed this difference in level of use to certain conditions that are more prevalent in US organizations. The intent of this study is to determine which of these conditions contribute to low usage of Action Learning in US organizations. Specifically, this study will look at seven possible conditions (a) variation in Action Learning form, (b) discussion versus dialogue, (c) limiting use of Action Learning to High Potential candidates, (d) lack of awareness of Action Learning constructs, (e) confusion or contention with other quality process initiatives, (f) prerequisite teamwork and social interactive skills, and (g) lack of emphasis on learning (and reflection) in the organization culture.

**Variation in Action Learning forms.** As described earlier, there is a noted difference in the Action Learning approaches between the US and non-US nations. Some of this can be contributed to the nature of Action Learning “which can vary greatly with the content in which it is applied and according to the different approaches of those who initiate it” (Easterly-Smith, Johns, Burgoyne, 1997, p. 347). Even Revans (1997) had recognized that the variations were causing confusion. Particularly he recognized that there were approaches that looked like “what I would have called pure Action Learning, but that is described by some other name” and other “reports of successful achievements in the field of management education that are listed as Action Learning, but later perusals still confirm my inability to detect in them what I have set forth in this chapter as characteristic (for me) of action learning” (p.13).

Perhaps this variation in approaches to Action Learning can be attributed to Revans resistance to creating a single, hard and fast definition of Action Learning. Pedlar (1997) suggests that this lack of a single definition “has both preserved Action Learning as a philosophy, preventing it from becoming just another management technique, and contributed to the plethora of activities claiming membership in the family” (p. xxx). Easterly-Smith, Johns, Burgoyne (1997) noted that Revans himself evolved Action Learning over time and as the
situation in which it was to operate changed.

This variation has been a two edged sword. On one side the variation has been part of the natural evolution that comes with learning. New experiences generate new knowledge that is generalized by changing the current model. However, on the down side, these variations may be producing poor results as noted in the literature, by Pedlar (1997), “Not all of this usage seems well informed” (p xxix), Weinstein (1997), “are not always the real McCoy” (p. 308), and Dixon (1997), “great deal of potential learning is lost” (p. 335). It is when these variations produce poor results that the further use of Action Learning in an organization can become jeopardized.

This variability or ease, at which Action Learning can be altered, is believed to be one of the contributors to low level of use in the US. As Marquardt (1999) has noted, “Action learning, as publicized in the US barely resembles the classic Action Learning as developed by Reg Revans and others earlier in this century” (p. xi). Often this variation takes the form of a task force (Dixon, 1997 and Lanahan & Maldonado, 1998). As Dixon (1997) observed, “It is as if many US companies have grasped the outward form of Action Learning, that is, teams working on problems, without however, attending to its essence” (p. 337). Therefore, this study will look at the rate of variable approaches used in the US compared to non-US nations.

Discussion versus dialogue. A second condition which may be more prevalent in US organizations is the use of debate style discussions. Bierema (1998) suggests that this use of advocacy as a means of discussion is both common in American organizations and at the same time an inhibitor to learning. The opposite of debate is dialogue which Issacs (1993) defines as “The discipline of collective learning and inquiry . . . a process for transforming the quality of a conversation and the thinking that lies beneath it” (p. 1). It is this collective learning and inquiry that Marquardt (1999) refers to as being necessary for successful Action Learning sets. This study will look at the use of discussion versus dialogue amongst US organizations as compared to the ratio of its use in non-US organizations.
Limiting use of Action Learning to high potential candidates. One of the most frequent uses of Action Learning is for Leadership Development. In the US this leadership Development often is focused on high potential candidates under the name of Hi-Pot or Fast Track Programs. There may be two problems with this. The first is that the program is only limited to the high potential candidates and is therefore not disseminated to the rest of the organization. The second problem relates to the nature of these Hi-Pot and Fast Track programs. Typically the way these programs are set up is the high potential candidates are drawn from different parts of the organization to come together for a short period of time to work with senior corporate management on a specific problem.

The people in this program then know that they are being evaluated to see how well they perform – can they pass the test to move to the next level in their career ladder. It is unlikely that they will want to publicly state what they don’t know, a key requirement for fostering questioning insight. Just by being selected for the program sends a message that the candidates are special which increases their confidence rather than causing them to project a sense of humility. This humility, according to many Action Learning practitioners (Barker, 1998; Botham & Vick, 1998; Brooks, 1998; Casey, 1997), is necessary to understand ones own ignorance before one could learn. So instead of being put in an environment that encourages understanding their ignorance, these Hi-Pots are often placed in an implied competitive situation, trying to prove they are as smart as or smarter than their peers. What is missing are the ingredients then for learning to occur for as Revans (1997) suggested, “only if a man, particularly the expert, can be persuaded to draw a map of his own ignorance, is he likely to develop his full potential” (p. 5). In addition to not wanting to show ones own ignorance, these Hi-Pot candidates may feel uneasy about challenging current organization management and practices as it may have the potential to make their seniors look the fool (Marsick & O’Neil, 1999).

Another problem with these Hi-Pot programs is that too often the members of the set only
take the problem as far as specifying a solution. Frequently the solution is not implemented or
the solution is given to someone else to implement. In either case there is not action that the set
members will participate in. Dixon (1998a) argued “If team members cannot experience the
outcome of their plan, their learning is aborted” (p. 46)

Dixon (1998b) also observed another problem with Hi-Pot teams at GM. That problem was
the tendency to put too much emphasis on solving the problem and not on the learning. Again,
is this a downside of the Hi-Pot programs. The candidates can see these retreats with senior
management as their one opportunity to prove their leadership value. Given a choice of
demonstrating they are a good problem solver as opposed to a good learner, most would opt for
the former. As a result, Dixon did not see the learning occurring until the closure process. Dixon
noted that often during the closure process that the Hi-Pot candidates recognized “that they
would have learned more and been more effective had they attended more to process issues when
they arose” (p. 111). Since some of the Hi-Pot programs at GM lasted for 4 months, it was 4
months of lost learning opportunity.

Limiting Action Learning to high potential candidate programs then is not without its
share of problems. The question then, is are these problems potentially limiting the widespread
use of Action Learning in the US. This study will look at the current practice of using of Action
Learning as a leadership development tool and determine if there are significant differences
between US organizations and non-US organizations.

Lack of awareness of Action Learning constructs. Another condition, which may exist in
US organizations, is lack of awareness of Action Learning. Rothwell (1999) describes lack of
awareness as “The first barrier to applying Action Learning” (p. 11). He suggests that the people
who would make the decision to use it would be reluctant because they had not heard of it or
because the organization lacked experience with it. According to Marquardt, “Although Action
Learning was developed and successfully applied over sixty years ago, most of us are still
unfamiliar with the concept, much less the practice, of action learning” (p. xi). Willis (1998) argued that organizations would only make a commitment to Action Learning after they have an understanding of why it is worthwhile doing. This study will look at the differences of awareness levels between US and non-US organizations to determine if this may be a significant contributor to the low level of use of Action Learning.

Confusion with other quality process initiatives. Another condition that exists in US organizations is the prevalence of task forces and quality circles. Task forces and quality circles have become part of the fabric of most US organizations since the 1980’s. When attempting to introduce Action Learning into organizations that are steeped in task forces and quality circles there can be confusion resulting from the similarities between the approaches as cited by Dixon (1997)

However, the form of Action Learning is difficult to distinguish from a typical cross-functional task force that is well known to most US managers. Its seeming familiarity induces US corporations to make use of those factors which are similar to cross-functional task forces and to overlook those factors associated with Action Learning that are dissimilar, but which carry the greatest potential for the development of participants. (p. 330).

Based on their experiences, Marsick and O’Neil (1999) observed that “programs designed around individual projects are more likely to appear in England than in the United States” (p. 164). Instead of projects designed around individual problems, Action Learning projects in the United States are more likely to be designed around group problems. Therefore, there could be a higher probability that Action Learning programs will become just another task force in US organizations.

Although there are similarities between Action Learning and task forces/quality circles, there are significant differences. Marquardt (1999) identified three differences between Action
Learning and other quality processes.

1. Task forces and quality circles tend to focus on the specific problem or task to be addressed rather than on identifying the organization wide, environmental, systemic elements is which the problem resides, and which must also be affected if lasting change is to take place. (p. 8)

2. Task forces and quality circles generally do not have the power or the expectation of taking action. (p. 8)

3. Task forces and quality circles are charged with addressing a problem or improving a product or procedure; any learning that occurs is incidental. Action learning groups on the other hand, are charged with learning from the problems they are solving, the assumptions they are challenging, and the actions they are confronting. (p. 9)

Unless the emphasis on the added benefits of Action Learning can be maintained throughout the program, the most likely result will be that the team will fall back into their task force mentality. Dixon (1998b) observed this when studying the GM leadership development program. First, she observed that the members gave “greater precedence to the task they have been assigned and to view team or individual development issues as something to be addressed after their works has been accomplished” (p. 111). Secondly, Dixon found that the facilitators had a difficult time keeping any focus on learning and reflection. Because of this confusion between Action Learning and other quality processes, this study will attempt to determine the prevalence of the existence of the confusion between US organizations and non-US organizations.

**Required teamwork and social interactive skills.** Another area that this study will investigate is the level of competence in teamwork and social interactive skills. The intent is to determine if there is a significant difference between the skills possessed by US personnel and their non-US counterparts. The importance of these social skills to the successful outcome of Action Learning has been noted by many practitioners, beginning with Revans who described
Actin Learning as “a social process, whereby those who try it learn with and from each other” (p. 4). Botham & Vick (1998) recognized that the social interactive skills necessary to simultaneously challenge and support “is a new experience for practitioners working in an Action Learning sets” (p. 11). Adams and Dixon (1997) added further refinement to the definition of these social interactive skills by suggesting that the Model II skills as developed by Argyris and Schron are necessary and “desirable for resolving organization problems . . . . This involves the skills of inquiry, a willingness to suspend judgement until all ideas are considered, and openly confronting conflict or disagreement” (p. 130). The importance of developing these skills among members of Action Learning sets is paramount because of the tensions that arise from dealing with real problems in real time while being openly challenged by their peers. O’Neil, Marsick, Yorks, Nilson, & Kolodny (1997) describe these tensions as originating from the difference that will exist between learning and delivering in addition to the those differences that arise between feeling comfortable with conflict in the form of open disagreement and maintaining team harmony.

However, what is the likelihood that all members of a set are aware of these skills. Mumford (1998) argued that to assume that individuals are aware of and are adept at these learning skills is “ill founded” (p. 235). Other Action Learning practitioners (Lewis, 1997; Adams & Dixon, 1997; Lawler, 1997; Thorpe, Taylor, & Elliott, 1997; Winkless, 1997; Willis, 1998) found that these skills are not typically present and therefore, it is necessary to build into the program the time to focus on developing these skills if they are not already present. How well these skills are developed and supported in and organization will determine the outcome of the Action Learning program.

Lack of emphasis on learning and reflection. The final condition that this study will investigate is the prevalence of learning as part of the organization culture. Dilworth (1998b) identified two components of Action Learning that have strong linkages to adult learning theory.
The first is that Action Learning is focused on working real problems and that adult learning theory tells us that “adults learn best when confronted with real situations in which they consider themselves stakeholders” (p. 17). The second component is the emphasis on reflection in Action Learning. Reflection is a key component of adult learning theories and is also a major emphasis of Action Learning. Others have also reported the importance of reflection in the Action Learning program as a key contributor to learning. Marquardt (1999) talks about the process of reflection as providing the opportunity to develop questioning insight. Weinstien (1998) has observed that Action Learning programs are designed to make space and time available to reflect, making it okay to learn. Yorks, O’Neil, Marsick, Lamm, Kolodny, & Nilson (1998) state that Action Learning provides a forum for reflection and questioning insight needed in today’s rapidly changing environments.

As such then Action Learning can be a key contributor to organization learning. Bierema (1998) suggests that Action Learning supports organizational learning by “adopting a systems perspective, creating shared vision, designing an infrastructure supportive of learning, creating a culture of learning, and cultivating new leaders” (p. 90-91). In this sense it is as Marquardt argued, “learning is what makes Action Learning strategic rather than tactical” (p. 4). Revans’ (1980) view of learning as a tool for organization wide intervention is founded in quantum mechanics and systems thinking – the individual learner cannot change the system without being changed in the process as they are part of the system. Therefore, organization learning requires taking action by changing the system and learning by changing the individual. According to Marsick and O’Neil (1999), this is what differentiates training from Action Learning which seeks to build the capacity of individuals and systems to learn how to learn” (p. 170).

Another way in which Action Learning has been argued to support organization learning is again linked to adult learning theory. Through the use of real life problems, Action Learning can accelerate learning (Bierema, 1998) and increase the likelihood of transfer of training back to the
workplace (Yorks et al. 1998).

With this strong linkage to adult learning theories, and if learning organizations are so greatly needed in today's chaotic world, why isn't Action Learning more widely used as a vehicle for organization learning? Perhaps the answer is tied to the lack of learning in organizations – that is, if learning is not important to an organization than Action Learning will not be seen as something to be pursued to positively affect the bottom line. Therefore, this study will look at the importance of learning in US organizations versus the importance in non-US organizations.

In this chapter potential attributes for successful Action Learning programs were identified from review of the literature. The absence of these attributes then could be barriers to reaping the full benefits of Action Learning. Seven barriers were selected for investigation to determine if these barriers may be more prevalent in US organizations. That is, do these barriers occur more frequently in US organizations as opposed to non-US organizations. The next chapter will describe the experiment used to test these seven hypotheses.
Chapter 3

The purpose of this study is to determine the role that barriers to Action Learning play in minimizing its use in US organizations. Barriers are identified by reviewing current literature on Action Learning practices. The prior chapters served as an introduction to Action Learning and the problem being investigated in addition to establishing seven potential barriers to successful Action Learning programs. This chapter describes the design of the experiment to test seven hypotheses developed from the seven potential barriers identified in the prior chapter. Specifically, the hypotheses state that the barriers will be more prevalent in US organizations than in non-US organizations.

Study Design and Methodology

To examine barriers to the use of the Action Learning model in firms, this study looks at how Action Learning is currently being deployed in both non-US and US organizations. Online survey research is employed to conduct this examination. Non-US organizations consist of, but will not be limited to those that are in the UK, Canada, and Australia/New Zealand. These non-US countries were selected because of the greater prevalence of Action Learning usage and because of the similarity of language and culture. This study relies on quantitative and qualitative data to determine (a) where Action Learning is currently being utilized, and (b) which factors may contribute to successful deployment (where the absence of these success factors would be considered a barrier).

Hypotheses

This study tests seven null hypotheses. Identifying the success attributes as described in the Action Learning literature developed these null hypotheses. Then it was proffered that the absence of these attributes would prevent the full benefits of an Action Learning program from being realized and therefore the absence of a success attribute is a barrier. For each barrier, it was hypothesized that the barrier would be more prevalent in US organizations than in non-US
organizations. For the experiment design, it was decided to test for the null hypothesis. Therefore each null hypothesis has the form - there is no difference between the prevalence of a specific barrier in US and non-US organizations.

Hypothesis $H_01$. There is no difference in the use of various forms of Action Learning between US organizations and non-US organizations.

Hypothesis $H_02$. There is no difference in the use of debate versus dialogue between US and non-US organizations.

Hypothesis $H_03$. There is no difference in the practice of limiting Action Learning to high potential candidates between US and non-US organizations.

Hypothesis $H_04$. There is no difference between the level of awareness of Action Learning constructs between US and non-US organizations.

Hypothesis $H_05$. There is no discernible difference in the amount of confusion that exists between Action Learning and other quality processes between US and non-US organizations.

Hypothesis $H_06$. There is no difference between the level of competence of set members in US organizations and set members in non-US organizations with respect to interactive and social skills.

Hypothesis $H_07$. There is no difference between the value US organizations put on learning and reflection and the value non-US organizations assign to learning and reflection.

Target Population and Sample

The target population consists of Action Learning practitioners who have experience in the deployment of Action Learning. The sample consists of members of several professional communities:

1. Professional organizations, including two chapters (USA and Canada) of the
International Federation of Action Learning (IFAL).

2. Members of three Action Learning discussion groups (a) action-learning@egroups.com, (b) imc-ali-discuss@mcbo.co.uk, and (c) www.skola.mark.se/webboard. All three are internet based discussion groups, the first supported by IFAL-USA, the second supported by the International Management Centres Association and the third maintained my Marks Kommun Sweden.

3. Attendees at the IFAL-USA 2001 Action Learning Conference.

Sample. Non-probability sampling is employed. "Non-probability samples are created because the units appear representative or because they can be conveniently assembled" (Fink, 1995, p. 17). According to Fink (1995), this type of sampling is appropriate in at least three situations (a) surveys of hard to identify groups, (b) surveys of specific groups, and (c) surveys in pilot situations. The situation for this study is to target a specific group for participation in a survey. For the purposes of this study, non-probability purposive judgement sampling is employed to select the sample that represents the target population. A purposive sample is a non-probability sample that conforms to certain criteria (Cooper & Schindler, 1998). Judgement sampling occurs when a researcher selects sample members to conform to some criterion. The criterion for members of this sample is to be an Action Learning Practitioner – one who has experience deploying Action Learning in an organization and is part of the larger Action Learning community of practice.

Data Collection

The instrument. The instrument consists of 24 questions (see Appendix B). The questions are grouped into three categories. The first category addresses demographic information regarding the practitioners' use of Action Learning, such as years practiced, how their skills were acquired, and in which countries they predominantly deploy Action Learning. The second category consists of questions to determine factors that contribute to the successful deployment
of Action Learning. These questions use an ordinal scale for responses (‘always’, ‘often’, ‘seldom’, and ‘never’). Development of these questions is based on review of current literature described in Chapter 2. The questions then are a restatement of enablers and barriers to successful Action Learning as described by noted Action Learning practitioners based on their own field experiences. The final category consists of an open-ended question, asking respondents to describe what they believe could be done to advance the practice of Action Learning. The instrument is made available in two media formats. An Internet web based version is maintained on the St. John Fisher College server. This online version of the survey is supplemented with a hardcopy version to be filled in and returned by the respondents.

**Data collection.** Participants were invited (see Appendix A) by e-mail to complete an online survey. In addition to the e-mail invitation, attendees at the IFAL-USA annual conference were invited to participate in the survey either by completing a hardcopy or online survey.

**Data Analysis**

Two types of analysis were applied to the data. Quantitative analysis was applied to the ordinal questions and qualitative analysis was applied to the open ended questions.

**Quantitative data.** The quantitative data was grouped and analyzed through the application of descriptive statistical methods. Frequency measures and chi square tests were employed to analyze the quantitative data. Chi Square was chosen to deal with the two samples (US versus non-US respondents) in a multiple category response test (‘always’ – ‘often’ – ‘seldom’ – ‘never’).

**Qualitative data.** Content analysis was applied to analyze the open-ended question. This question asks respondents to ‘list the top things you would do’ to advance the practice of Action Learning. The purpose of the content analysis is to “find the big ideas” (Krueger, 1988, p. 120). To isolate the big ideas from the responses to the open ended questions, an affinity diagram was employed. An affinity diagram is a tool used “to gather large amounts of language data (ideas,
opinions, issues, etc.) and organize it into groupings based on natural relationship between each item” (Brassard, 1989, p. 4).

The methodology used to create an affinity diagram consists of three steps. First the responses will be divided into two groups based on respondents answer to the question, ‘what country have you most frequently deployed Action Learning programs?’ Responses from respondents who selected USA were placed in the US group. Responses from other respondents were placed in the non-US group. Second the responses were parsed by the author into common themes based on word usage (e.g. all statements that had the word ‘value’) or by target of response (e.g. all statements that were focused on what should be done at the organization level as opposed to the set participant level). The final step was to assign a label to each theme group.

An example of one of the affinity diagrams, based on the input from the survey is presented in Figure 1. This diagram is the results of sorting the responses from the non-US practitioners. From the sort 7 themes emerged. Each box represents one of the seven themes and the responses assigned to that theme.

This chapter described the design of the experiment conducted to determine if there is a difference in the prevalence of barriers to Action Learning between US and non-US organizations. The barriers identified in Chapter 2 were transformed into seven hypotheses and then subsequently into null hypotheses. The experiment was conducted by inviting current Action Learning practitioners from several nations to participate in this research by completing a survey. The results of the survey are presented in the next chapter.
Figure 1. Affinity Diagram Based on Responses to Question #24 from non-US Group [note: respondents use the term ‘AL’, ‘a. l.’ and ‘al’ to mean Action Learning].
Chapter 4

The purpose of this study is to determine the role that barriers to Action Learning play in minimizing its use in US organizations. Barriers were identified by reviewing current literature on Action Learning practices. The prior chapters served as an introduction to Action Learning and the problem being investigated in addition to establishing seven potential barriers to successful Action Learning programs. Further, the prior chapters also described the experiment used to determine if these barriers are more prevalent in US organizations than in non-US organizations. This chapter describes the results of the experiment to test seven hypotheses that were developed from the seven potential barriers identified in Chapter 2. Specifically, the hypotheses state that the barriers will be more prevalent in US organizations than in non-US organizations.

Respondent Demographics

The sample of this study was limited to practitioners of Action Learning. However, as we saw from the literature review in Chapter 2, there is not a hard and fast definition of Action Learning. Some practitioners have taken poetic license calling their programs Action Learning even when it bears no resemblance to what Reginald Revans would consider characteristic of Action Learning. In order to screen out those practitioners who deploy programs that they refer to as Action Learning but do not possess the characteristics typically recognized as Action Learning, all respondents were asked to read a description of Action Learning as defined by the Canadian Chapter of the International Federation of Action Learning.

Action learning involves working on real problems, focusing on learning and actually implementing solutions. It is a form of learning by doing. Pioneered by Professor Reg Revans and developed worldwide over the last 40 years. It provides a well-tried method of accelerating learning that enables people to handle difficult situations more effectively. Action learning is a process of inquiry, beginning with the experience of not knowing
'what to do next', and finding that answers are not available through current expertise.

When expertise fails to provide an answer, collaborative inquiry with fellow learners who are undergoing the same questioning experience is always available. To be effective, this partnership in learning needs to be both supportive and at the same time challenging, deeply caring yet questioning. Such partnerships actually create themselves when different people with different ideas engage whole-heartedly with each other to resolve each other’s problems. Retrieved March 22, 2001, from the World Wide Web:

http://www.tlainc.com/al.htm

If the respondents believed the programs they deployed were similar to this they were asked to proceed with the rest of the survey. If their programs did not agree with the definition, they were asked to provide the definition of Action Learning that they used and not to complete the remainder of the survey. Twenty-seven people responded to the survey indicating they were deploying a program similar to this definition of Action Learning. One person responded that the definition was not consistent with their program but did in fact complete the survey. This individual cited they were using Action Reflection Learning. Since other respondents who said they were using Action Reflection Learning responded that the definition was consistent with their programs, it was decided to keep the responses from that individual. This brought the total number of completed surveys to 28.

Where Action Learning is being deployed. For this study, respondents were categorized as US or non-US practitioners depending upon how they answered the question, ‘In what country have you most frequently deployed Action Learning programs?’ Table 1 represents the respondent’s answers to this question. Those respondents that selected countries other than the choices listed included Malaysia (1), South America (1), and Hong Kong (1).
Table 1
Country Which Respondents Predominantly Practice Action Learning

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>13</td>
</tr>
<tr>
<td>UK</td>
<td>4</td>
</tr>
<tr>
<td>Canada</td>
<td>5</td>
</tr>
<tr>
<td>Australia</td>
<td>0</td>
</tr>
<tr>
<td>New Zealand</td>
<td>0</td>
</tr>
<tr>
<td>Sweden</td>
<td>3</td>
</tr>
<tr>
<td>Netherlands</td>
<td>0</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
</tr>
<tr>
<td><strong>total</strong></td>
<td><strong>28</strong></td>
</tr>
</tbody>
</table>

Years deploying Action Learning. Question 1 in Part B of the survey asked respondents to indicate how long they have been deploying Action Learning. The average number of years deploying Action Learning programs was 7.2 for all the respondents, with an average of 7.9 for US practitioners and 6.5 for non-US practitioners. The range for both groups was a minimum of 1 year and a maximum of 20 years.

Applications of Action Learning Programs. Question 7 in Part B of the survey asked respondents to state in what types of applications have they utilized Action Learning. Choices were problem solving, teambuilding, organization learning, leadership development, professional growth and career development, and other. Those respondents who selected ‘other’ were also asked to state the specific applications of Action Learning. Respondents who chose ‘other’ reported using Action Learning in the US for reflective practice, community building, and
grassroots organizing and respondents from the non-US group reported using it for personal
growth, personal development, and visioning. Table 2 contains the frequency of counts for each
of the applications of Action Learning.

Table 2

<table>
<thead>
<tr>
<th>Applications of Action Learning</th>
<th>US</th>
<th>Non-US</th>
<th>total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem solving</td>
<td>10</td>
<td>13</td>
<td>23</td>
</tr>
<tr>
<td>Teambuilding</td>
<td>7</td>
<td>10</td>
<td>17</td>
</tr>
<tr>
<td>Organization learning</td>
<td>9</td>
<td>11</td>
<td>20</td>
</tr>
<tr>
<td>Leadership development</td>
<td>11</td>
<td>10</td>
<td>21</td>
</tr>
<tr>
<td>Professional growth &amp; career development</td>
<td>6</td>
<td>11</td>
<td>17</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>3</td>
<td>6</td>
</tr>
</tbody>
</table>

Analysis of Quantitative Data

Hypothesis H₀₁ The first null hypothesis tested is that there is a no difference in the use
of various forms of Action Learning between US organizations and non-US organizations.

Figure 2 describes the responses to three questions (questions 5, 6, and 8 from Part B of the
survey) that were used to determine if a difference exists. These three questions addressed the
use of various forms of Action Learning by asking the respondents to state the model they
employ, the name they use to refer to the program, and how is reflection used. These were three
types of variations stated in current literature as reviewed in Chapter 2.

From the results none of the questions returned a statistically significant difference
between the responses of the two groups. Using the chi square test, it was determined that there
was a not a statistically significant difference in the responses between the use of models
between the two groups. Question 5 in the survey asked the respondents to identify which model they are following in their deployment of Action Learning. Although not statistically significant, given a choice of the Revans model, a variation of the Revans model, and a model other than these, a higher proportion of the US respondents (33%) stated they were using something other than a Revans based model. Only 17% of the non-US respondents stated they were using a model other than one based on the Revans’ model.

<table>
<thead>
<tr>
<th>Question 5: In deploying Action Learning do you follow the model as defined by Reginald Revans or are you using some variation?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>US</td>
</tr>
<tr>
<td>Non-US</td>
</tr>
<tr>
<td>total</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Question 6: In your practice, do you use the term Action Learning or do you use a different term (e.g. work-based learning, event-based learning, accelerated learning, action-reflection-learning®)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>US</td>
</tr>
<tr>
<td>Non-U.S</td>
</tr>
<tr>
<td>total</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Question 8: In your deployment of Action Learning, when does reflection occur?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>US</td>
</tr>
<tr>
<td>Non-US</td>
</tr>
<tr>
<td>total</td>
</tr>
</tbody>
</table>

Figure 2. Variations of Action Learning in US Organizations versus non-US Organizations:

Frequency and Chi Square Test.

Hypothesis H$_{0.2}$. The second null hypothesis tested by this study is there is no difference in the use of debate versus dialogue between US and non-US organizations. Figure 3 shows the
responses provided by the practitioners to survey question number 15. This question addressed
the use of dialogue as opposed to discussion in organizations where Action Learning is being
deployed. Use of dialogue was cited in the current literature reviewed in Chapter 2, as an
important contributor to the success of action Learning. Using the chi square test, it was
determined that there was not a significant difference in the responses between the use of
dialogue and discussion between the two groups with \( p = 0.3496358 \). Based on this result, the
null hypothesis is not rejected as the p value is greater than the level of significance with \( \alpha = .01 \)

| Question 15: From your experiences what is the frequency that you have found that the
| sponsoring organization has a culture that encourages the use of dialogue as opposed to debate
| or advocacy in discussions? |
|-----------------------------|-------|-------|-------|-------|-------|
|                             | Always| Often | Seldom| Never | Results |
| US                          | 1     | 2     | 9     | 0     | \( \chi^2 = 0.3496358 \) |
| non-US                      | 0     | 5     | 9     | 0     |          |
| total                       | 1     | 7     | 18    | 0     |          |

Figure 3. Encouragement of Dialogue versus Debate in US and non-U.S Organizations:

Frequency and Chi Square Test.

**Hypothesis H_03.** The third hypothesis tested by this study is to determine if there is a
difference between US and non-US organizations when it comes to the practice of limiting
Action Learning to high potential candidates. The null hypothesis is that there will not be a
difference between the two groups. Figure 4 shows the responses provided by the practitioners to
survey question number 20. This question addressed the use of limiting participation in programs
to high potential management candidates in organizations where Action Learning is being
deployed. Limiting participation in Action Learning was cited in the current literature reviewed
in Chapter 2, as an important barrier to the success of Action Learning. Using the chi square test,
it was determined that there was not a significant difference in the responses regarding the
practice of limiting participation in Action Learning between the two groups with \( p = 0.1616304 \).
Based on this result, the null hypothesis is not rejected as the p value is greater than the level of
significance with $\alpha = .01$

<table>
<thead>
<tr>
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<th>Often</th>
<th>Seldom</th>
<th>Never</th>
<th>Results</th>
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<tr>
<td>non-US</td>
<td>0</td>
<td>6</td>
<td>4</td>
<td>2</td>
<td></td>
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<tr>
<td>total</td>
<td>3</td>
<td>12</td>
<td>7</td>
<td>2</td>
<td>$\chi^2 = 0.1616304$</td>
</tr>
</tbody>
</table>

**Figure 4.** Limiting use of Action Learning to High Potential Candidates in US and non-US Organizations: Frequency and Chi Square Test.

**Hypothesis $H_{o4}$.** The fourth hypothesis tested by this study is to determine if there is a difference between the level of awareness of Action Learning constructs between US and non-US organizations. The null hypothesis is that there will not be a difference. Figure 5 describes the responses to two questions (questions number 9 and 17 from Part B of the survey) that were used to determine if a difference exists between the two groups. These two questions addressed the level of awareness of Action Learning constructs in organizations where it is being deployed. Lack of awareness was cited in the current literature reviewed in Chapter 2, as a barrier to the success of Action Learning. Using the chi square test, it was determined that there was not a significant difference in the responses to these two questions, with $p = 0.4668543$ and 0.2362518. Based on this result, the null hypothesis is not rejected as the p value is greater than the level of significance with $\alpha = .01$ for both questions.
Question 9: From your experiences, what is the frequency that you have found that Action Learning Set members have a clear understanding of the constructs and benefits of Action Learning?

<table>
<thead>
<tr>
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<tr>
<td>non-US</td>
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<td>10</td>
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<td>0</td>
<td></td>
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<tr>
<td>total</td>
<td>0</td>
<td>17</td>
<td>10</td>
<td>1</td>
<td>$\chi^2 = 0.4668543$</td>
</tr>
</tbody>
</table>

Question 17: From your experiences, what is the frequency that you have found that the sponsoring organization attempts to apply Action Learning to inappropriate problems?

<table>
<thead>
<tr>
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<th>Often</th>
<th>Seldom</th>
<th>Never</th>
<th>Results</th>
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<tr>
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<td>0</td>
<td>2</td>
<td>9</td>
<td>1</td>
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</tr>
<tr>
<td>non-US</td>
<td>0</td>
<td>5</td>
<td>6</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>total</td>
<td>0</td>
<td>7</td>
<td>15</td>
<td>4</td>
<td>$\chi^2 = 0.2362518$</td>
</tr>
</tbody>
</table>

Figure 5. Awareness of Action Learning Constructs in US and non-US Organizations: Frequency and Chi Square Test.

**Hypothesis Hₐ5.** The fifth hypothesis to be tested by this study is to determine if the amount of confusion between Action Learning and other quality constructs varies between US and non-US organizations. The null hypothesis is that there will not be a difference. Figure 6 describes the responses to the question that was used to determine if a difference exists between the two groups. This question addressed the potential confusion between Action Learning and other organization effectiveness initiatives in organizations where it is being deployed. This confusion was cited in the current literature reviewed in Chapter 2, as a barrier to the success of Action Learning. Using the chi square test, it was determined that there was not a significant difference in the responses to this question, with $p = 0.525788$. Based on this result, the null hypothesis is not rejected as the p value is greater than the level of significance with $\alpha = .01$ for this question.
Question 10: From your experiences, what is the frequency that you have found that Action Learning Set members understand the differences between Action Learning and other organization effectiveness initiatives such as task forces, quality circles, TQM, simulations, etc.?

<table>
<thead>
<tr>
<th></th>
<th>Always</th>
<th>Often</th>
<th>Seldom</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>0</td>
<td>6</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>non-US</td>
<td>1</td>
<td>8</td>
<td>6</td>
<td>0</td>
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<tr>
<td>total</td>
<td>1</td>
<td>14</td>
<td>12</td>
<td>0</td>
</tr>
</tbody>
</table>

\[\chi^2 = 0.525788\]

**Figure 6.** Confusion Between Action Learning and other Quality Constructs Between US and non-US Organizations: Frequency and Chi Square Test.

**Hypothesis H.6.** The sixth hypothesis to be tested by this study is to determine if there is a difference between the level of competence of set members in US and non-US organizations with respect to interactive and social skills, such as giving and receiving feedback, questioning, and valuing diversity. The null hypothesis is that there will not be a difference. Figure 7 describes the responses to the question that was used to determine if a difference exists between the two groups. This question addressed the need for good interactive skills in organizations where it is being deployed. A foundation in good interactive skills among the Action Learning Set members was cited in the current literature reviewed in Chapter 2, as an enabler to the success of Action Learning. Using the chi square test, it was determined that there was not a significant difference in the responses to this question, with \( p = 0.1760756 \). Based on this result, the null hypothesis is not rejected as the p value is greater than the level of significance with \( \alpha = .01 \).
Question 12: From your experiences what is the frequency that you have found that Action Learning Set members demonstrate a competence in interactive and social skills, such as giving and receiving feedback, questioning, and valuing diversity?

<table>
<thead>
<tr>
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<th>Often</th>
<th>Seldom</th>
<th>Never</th>
<th>Results</th>
</tr>
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<td>total</td>
<td>1</td>
<td>19</td>
<td>8</td>
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**Figure 7.** Variation in interactive and Social Skills Between US and non-US Organizations:

Frequency and Chi Square Test.

**Hypothesis H07.** The final hypothesis tested in this study is to determine if there is a difference between the value that US and non-US organizations put on learning and reflection.

The null hypothesis is that there will not be a difference. Figure 8 describes the responses to five questions (questions number 11, 13, 14, 18, and 22 from Part B of the survey) that were used to determine if a difference exists between the two groups. These five questions addressed the level of importance Action Learning Set members and organizations put on reflection and learning.

Lack of awareness was cited in the current literature reviewed in Chapter 2, as a barrier to the success of Action Learning. Using the chi square test, it was determined that there was not a significant difference in the responses between the two groups to any of these five questions, with $p$ values equal to 0.5483506, 0.058758, 0.2543547, 0.4971902, and 0.2410548. Based on this result, the null hypothesis is not rejected as the $p$ values are greater than the level of significance with $\alpha = .01$ for all five questions.
Question 11: From your experiences, what is the frequency that you have found that Action Learning Set members have an understanding of the importance of reflection to learning?

<table>
<thead>
<tr>
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<th>Often</th>
<th>Seldom</th>
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<th>Results</th>
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<td>total</td>
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<td>17</td>
<td>7</td>
<td>0</td>
<td>$\chi^2 = 0.5483506$</td>
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</table>

Question 13: From your experiences what is the frequency that you have found that the sponsoring organization values learning as a key contributor to their strategic success?

<table>
<thead>
<tr>
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<th>Seldom</th>
<th>Never</th>
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<td>1</td>
<td></td>
</tr>
<tr>
<td>total</td>
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<td>17</td>
<td>7</td>
<td>1</td>
<td>$\chi^2 = 0.058758$</td>
</tr>
</tbody>
</table>

Question 14: From your experiences what is the frequency that you have found that the sponsoring organization is open to, and encourages, questioning of the way things are normally accomplished?

<table>
<thead>
<tr>
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<th>Often</th>
<th>Seldom</th>
<th>Never</th>
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<td>0</td>
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</tr>
<tr>
<td>non-US</td>
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<td>1</td>
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<tr>
<td>total</td>
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<td>15</td>
<td>10</td>
<td>1</td>
<td>$\chi^2 = 0.2543547$</td>
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</table>

Question 18: From your experiences what is the frequency that you have found that the sponsoring organization has an infrastructure for sharing new information and knowledge?

<table>
<thead>
<tr>
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<th>Often</th>
<th>Seldom</th>
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<td>0</td>
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</tr>
<tr>
<td>non-US</td>
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<td>2</td>
<td>11</td>
<td>1</td>
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<td>total</td>
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<td>21</td>
<td>1</td>
<td>$\chi^2 = 0.4971902$</td>
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</table>

Question 22: From your experiences what is the frequency that you have found that the sponsoring organization has an equal emphasis on action and learning?

<table>
<thead>
<tr>
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<th>Always</th>
<th>Often</th>
<th>Seldom</th>
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<td>10</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>non-US</td>
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<td>7</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>total</td>
<td>1</td>
<td>6</td>
<td>17</td>
<td>1</td>
<td>$\chi^2 = 0.2410548$</td>
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</tbody>
</table>

Figure 8. Variation of Value Put on Learning and Reflection Between US and non-US Organizations: Frequency and Chi Square Test.
Analysis of Qualitative Data

An affinity sort was conducted on the responses to Question 24 of the survey, “Finally, if you could advance the practice of Action Learning, what would you do?” The responses were divided into two groupings, one for the responses from US practitioners and the other for the responses from the non-US practitioners. Within each of the two groups an affinity diagram was created to capture common themes. Table 3 represents the summary data and shows the major themes from each of the two groups and the number of items associated with each theme. The number of items in each theme can be interpreted as a measure of importance to the group of respondents.

Table 3

Results of Content Analysis Comparing Responses to Survey Question 24 from US and non-US Respondents.

<table>
<thead>
<tr>
<th>Theme</th>
<th>US Respondents</th>
<th>Non-US Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touting the Value of Action Learning</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>Practice/Methodology</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>Research/Academia</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Broadening the Application of Action Learning</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>Develop Community of Practice</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Spreading the Word</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>How to Institute Action Learning Programs</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Personal growth</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>40</td>
<td>36</td>
</tr>
</tbody>
</table>

The themes have the following meanings. Touting the Value of Action Learning refers to
those responses that suggested that the way to advance the practice of Action Learning is to build up a portfolio of successes so as to better sell the program. *Practice/Methodology* is the grouping of responses that address how to better apply Action Learning in practice. Responses that contained references to universities, colleges, graduate programs, and research were grouped in *Research/Academia*. *Broadening the Application* of Action Learning captures those responses that talk to moving the program beyond today’s ‘traditional’ uses. *Develop Community of Practice* is the theme given to those responses that talked about reaching out to other Action Learning practitioners. This then is slightly different than *Spreading the Word*. The responses captured in *Spreading the Word* were directed outside the Action Learning community. *How to Institute Action Learning Programs* is the grouping of responses that addressed improving the way Action Learning programs are established in organizations. And the last theme, *Personal Growth*, capture the responses which were directed inward to the practitioner providing the response (e.g. change starts from within).

Initial observations are that there were more responses from the US survey participants even though there were two less respondents in that group. A second observation is that the responses from the US respondents clustered around a smaller number of themes. A third observation is that the number of responses around the need to justify the value of Action Learning is much higher from the US respondents as opposed to their colleagues from the non-US group. A fourth observation is that US respondents cited moving Action Learning into different applications as a way to advance it much more frequently than their non-US counterparts. Finally, the focus of the US respondents was to build a stronger community of practice (e pluribus unum) while the non-US respondents appeared to be reaching out beyond their community of practice to others outside of the Action Learning field. Both this qualitative data and the results of the quantitative date will be discussed in the next chapter.
Chapter 5

The purpose of this study was to determine the role that barriers to Action Learning play in minimizing its use in US organizations. Reviewing current literature on Action Learning practices identified seven potential barriers. An experiment was designed and used to determine if these barriers are more prevalent in US organizations than in non-US organizations. Chapter 4 presented the results of the experiment to test seven hypotheses that were developed from the seven potential barriers identified in Chapter 2. Specifically, the hypotheses stated that the barriers would be more prevalent in US organizations than in non-US organizations. Based on the results of the data analysis none of the null hypotheses were rejected. This chapter will discuss the results and the implications for this study and future research.

Discussion of Results

Discussion of Demographic Data

The population consisted of Action Learning practitioners from all over the world. A convenience sample was drawn from this population utilizing two mechanisms. The first mechanism was to invite Action Learning practitioners, via e-mail and web boards, to participate in a web based survey. The second mechanism was to invite Action Learning practitioners at the IFAL-USA 2001 Annual Conference to complete a hardcopy survey, if they had not already submitted a survey online. A total of 22 surveys were completed online and 6 hardcopy surveys were completed at the IFAL-USA conference (or shortly thereafter and land mailed). A total sample size of 28 is small and probably only represents about 10% of the practitioners polled.

The respondents were about evenly split between those who predominantly deploy Action Learning in the US and those who deploy predominantly in non-US organizations. In addition the amount of years deploying Action Learning was almost exactly the same. One could argue that the sample size was too small to be representative. However, the even split and the similarity in years practicing between the two groups, although not conclusive, infers that the
respondents are representative of the larger Action Learning practitioner population. Further evidence that the sample population was representative is there was no statistically significant difference between the US and non-US respondents with respect to applications of Action Learning.

Discussion of Quantitative Data

The purpose of this experiment was to identify barriers to Action Learning that were more prevalent in US organizations than in non-US organizations. The hypothesis tested was Action Learning's slow adoption rate in the US could be attributed to the presence of barriers that were more prevalent than in non-US organizations. From reviewing literature authored by Action Learning practitioners (Adams & Dixon, 1997; Barker, 1998; Bierema, 1998; Botham & Vick, 1998; Brooks, 1998; Casey, 1997; Dilworth, 1998b; Dixon, 1997; Dixon, 1998a; Dixon, 1998b; Easterly-Smith, Johns, & Burgoyne, 1997; Lawler, 1997; Lewis, 1997; Marquardt, 1999; Mumford, 1997; O'Neil et al. 1997; Pedlar, 1997; Revans, 1997; Rothwell, 1999; Thorpe, Taylor, & Elliott, 1997; Weinstien, 1997; Weinstein, 1998; Willis, 1998), success attributes were identified. It was reasoned that the absence of these success attributes would constitute a barrier to a successful deployment of Action Learning, where successful deployment means that the full benefits of the program would be reaped by the sponsoring organization. Seven barriers were identified. From the seven barriers, seven hypotheses were developed and subsequently transcribed into null hypothesis for testing.

The results of the quantitative data were analyzed utilizing the chi square test. This test was chosen, as it is most appropriate for attempting to discern a difference between the proportions of responses from two (or more) populations. The results of the chi square tests indicated that none of the seven null hypotheses could be rejected. Based on the data analysis there was no statistically significant difference found between the US and non-US groups regarding the 7 barriers. This suggests that the prevalence of barriers is similar between US and
Discussion of Qualitative Data

The responses to the open-ended question are more telling than the quantitative data. Asked to identify what could be done to advance the practice of Action Learning, the comments from the respondents did show a visually observable difference using an affinity diagram. Based on the diagram it was apparent that US respondents believe that one way to advance the state of the practice is to capture success stories as a way to convince people of the value of Action Learning. The US respondents cited this 9 times to the non-US respondents 4 times. One can conclude from this that the US respondents are still finding it necessary to convince others of the value of Action Learning. This correlates with the observation (Dixon, et al, 1997) that the value of Action Learning is “difficult to promote or explain to action oriented managers in the US” (p. 264). US practitioners must therefore be in a position of having to continually provide proof of the value of conducting Action Learning programs in a new client’s organization.

Another area of differentiation between US and non-US organizations appears to be surrounding the *Practice/Methodology* theme. All comments pertaining to what could be done in the Action Learning set to advance the state of Action Learning were grouped in this theme. US respondents provided 10 comments in this theme while their non-US counterparts only provided 7. However, looking at the responses to this question coupled with the responses to another theme, *How to institute Action Learning Programs*, provides a picture of focus differentiation between the two groups. The non-US respondents provided 11 comments in the *How to Institute Action Learning Programs* (their largest theme) which is focused more at the organization level whereas the US respondents did not have any comments in this theme. It appears that the non-US respondents were more focused on taking steps to improve Action Learning at the organizational level whereas the US respondents were focusing on steps within the Action Learning set.
An interesting differentiation is observed between how respondents comment about engaging others. The US respondents commented on engaging others in the Action Learning community while the non-US respondents commented on engaging others outside of their community as a way to advance the practice of Action Learning. One interpretation is that the non-US Action Learning communities are more established and they are ready to take it to the next level by engaging others outside of their sphere to create collaborations with practitioners from other disciplines. The implication for the US comments is that the Action Learning community of practice may not be as evolved or mature as their non-US counterparts and that the direction for now is a desire to create a stronger foundation.

Finally, another differentiation was observed in the theme Broadening the Application of Action Learning. This theme captures those comments that suggest a way to advancing the state of Action Learning is to move the program beyond today’s ‘traditional’ uses. US respondents were more likely (6 to 1) to suggest, as a way to advance the practice of Action Learning, non-traditional forms of the model. This propensity to modify the Action Learning model is consistent with the results of Question 5 from the survey. This question asked what model the respondent follows in deploying Action Learning. A higher percentage US respondents (33%) were more likely to use a model other than a model based on the Revans’ model. This compared with smaller percentage of non-US respondents (17%) reporting using a model other than one based on the Revans’ model. These two observations are further evidence that support the supposition that US practitioners are more willing to use models not based on the Revans model than their non-US counterparts. These observations imply that there is a greater likelihood of variations of Action Learning occurring in US organizations. Several of the previously cited authors noted this difference and suggested that these variations can lead to less than optimal results (Dixon, 1997; Easterly-Smith et al. 1997; Marquardt, 1999; Pedlar, 1997; Revans, 1997; Weinstein, 1997). Although the quantitative did not support the hypothesis that barriers to
Action Learning would be more prevalent in the US, the qualitative data hints at a potential differences

Summary Discussion

Based on the results of this study there was not enough evidence to conclude that the reason that Action Learning has not been as widespread in US organizations as it is in non-US organizations is because there was a greater prevalence of barriers. There are two possible alternatives that are offered to explain this observation. First, that the popularity of Action Learning is the same for US and non-US organizations. The starting point for this study was based on personal observations, albeit by some of the most noted Action Learning practitioners (Marquardt, 1999; Raelin, 1997a; Raelin, 1997b). A potential follow up to this study should be to determine if Action Learning has caught on more in one environment over another, where the environment could be a national or organizational culture.

The second alternative explanation of these results is that the barriers to Action Learning are now common across the global community. It is possible that during the 70’s and 80’s these barriers may have been more prevalent in the US. During that time the spread of Action Learning may have been faster outside of the US. However, given the spread of the global economy and the greater number of multinational corporations, these barriers may now be just as prevalent in other countries as they are in the US organizations. The implication of this is that if these barriers did in fact slow the progress of Action Learning in the US they have the potential to slow the progress in organizations outside of the US. Therefore the slow spread of Action Learning in the US could also begin to be experienced in other countries.

A limitation of this study was the sample size, which may be too small to be truly representative of the population. It is difficult to know how many people actually saw the invitation to participate. This difficulty is a nuance of using electronic media to broadcast invitations to participate in the survey. Because some people appear on multiple lists and some
people no longer ‘reside’ at their email address, it is difficult to know how many invited participants actually saw the invitation. However, a rough estimate is that 250 people were sent the survey. Only 22 of 28 completed surveys were submitted electronically. The 22 completed surveys represent less than a 10% response rate. This low response rate may very well be due to the inability of people to keep up with their e-mail. In fact one of the respondents did reply that from the time they saw the first invitation to the time they could set aside 15 minutes to complete the survey, 3 weeks had elapsed.

Perhaps in the future, a better approach would be to conduct a sponsored survey that occurs as part of the Action Learning communities annual conferences. An organization like the International Federation of Action Learners, which has chapters in several countries, could sponsor a survey. Several months before the survey, information could be sent out through their organization newsletters. Conducting the actual survey and subsequent follow up could be carried out by the local chapters, insuring greater participation. Having a community sponsored study with the intent to take action, would also provide greater value back to the survey participants, providing greater encouragement to complete the instrument.

Future Research

This study, like Raelin’s (1997) work to identify “parameters for success” (p. 369), set out to identify factors that prevented the attainment of successful outcomes of Action Learning programs. Unlike Raelin’s study which focused on both the “type of individual and the quality of setting that might precondition participants to favorable outcomes” (p. 371) this study directed the research on conditions that may or not exist in organizations. However, the intent of the two studies was the same. That is to increase the understanding of actions that could be taken to broaden the use of Action Learning.

This study set out to test the supposition that there was a greater prevalence of barriers to Action Learning in the US then in other countries. Although this study did not bear out this
supposition, it did confirm the presence of the barriers in both US and non-US countries. Based on this affirmation of the presence of these barriers, the results of this study should be of great interest to Action Learning practitioners. Naturally, if these barriers are slowing the progress of Action Learning it is of paramount importance that all current and future practitioners have an understanding of how to mitigate their impacts. If Action Learning holds such great promise to help organizations in these times of seemingly relentless change as many practitioners believe (Dilworth, 1998b; Garratt, 1997; Marquardt, 1999; Revans, 1998), then it is essential that effective means to deal with the barriers are discovered.

Therefore, an area of future research should be to focus on refining the qualification and quantification of barriers to Action Learning. That is, research should be conducted to isolate the vital few barriers to Action Learning. One approach to determine the vital few would be to solicit from the larger Action Learning community, what each practitioner believes to be the top 5 barriers to Action Learning. A simple pareto of the results would identify the most common barriers encountered by current practitioners. Subsequent research then could be conducted to develop diagnostics that would enable the practitioner to detect barriers (with enough data to convince would-be sponsors). Additional research should be conducted to test the best methods to deal with these barriers. An example of a potential barrier mitigation would be to introduce Action Science principles to participants prior to the first meeting of the set as suggested by some practitioners (Adams & Dixon, 1997; Botham & Vick, 1998; Lawler, 1997; Mumford, 1998; Thorpe, Taylor, & Elliott, 1997; Winkless, 1997; Willis, 1998). Another mitigation strategy would be to develop a database of Action Learning successes. Having a database of successes was something that many respondents cited as being desirable, but only 6 stated that they had access to such a database.

A general observation from the review of the Action Learning literature is that much of it falls into the anecdotal, case study type and not nearly as much would be considered true
research. Raelin (1997) shared this same observation regarding the lack of research. Perhaps more research would also help to lend more credence to the Action Learning program, something the US respondents felt was necessary to advance the state of Action Learning. Considering that Action Learning is a form of human resource development one would expect to see a greater use of the ‘research to practice and practice to research’ method. As with other areas of the human resource development field, research is important as it “leads to improvements in HRD methods or the performance of individuals, work groups, or organizations” (Rothwell & Sredl, 1992, p. 2). Rothwell and Sredl go on to say that “When HRD professionals conduct such research and publish results - or present their findings at professional conferences – they contribute to the growing body of knowledge about the field” (p. 2). It appears that there is certainly an opportunity for Action Learning practitioners to conduct more research with the express goal of sharing their findings to increase the body of knowledge among the global community.

This study began with the observation that Action Learning should be more prevalent based on it’s purported ability to help people deal with the rapid changes that our technology driven, global marketplace continues to spawn. The need for dealing with these changes cries out for organizations to quickly adapt to a new way of operating.

In the rapidly changing global marketplace, many business are finding that their traditional organizations are more of an obstacle than an advantage in leveraging opportunities. . . . To compete in this world, companies must develop new organizational models. . . . This is massive change – a redefinition of terms – for an entire industry or market, resulting from the confluence of powerful driving forces. (Morrison, 1996, p. 11). Organizations faced with this continuous change need a method for quickly transforming their structure and more importantly their people into an adaptive entity. It is unlikely that the rate of change will be reduced, as there is nothing in sight to break the competitive nature of our economic markets or to stop the technology engine that “keeps rumbling beneath our feet. . . .
and despite everyone’s best intentions, yet another tornado gets under way” (Moore, 1995, p. 7). If Action Learning can, as Reginald Revans (1998) observed about the change facing people in the 1990’s, become “a simple and direct approach in adapting to the accelerating rate of change” (p. 23), then the question still remains why isn’t it more popular. Perhaps, as this study has suggested, the barriers to Action Learning continue to be too prevalent in many organizations.

If Action Learning is to become a way for people to better deal with these changes then greater emphasis should be put on understanding the factors in play which prevent its widespread use. Only by neutralizing these barriers can we expect to see an increased usage of Action Learning in organizations that are undergoing these dramatic changes. This study should serve as a starting point for other Action Learning practitioners and researchers to build on the common understanding of the barriers and ways to remove them from organizations where they exist.
References


Improvement Quarterly, 11(2), 17-37.


Appendix A

Invitation to Participate in Study

Christopher Comparetta
19 Squire Lane
Pittsford, NY 14534

Dear Colleagues,

I am a Master of Science candidate in the Graduate Human Resource Development (GHRD) program at St. John Fisher College currently working on a research project that examines the barriers to Action Learning. To study this issue, I am inviting Action Learning practitioners to participate in a brief online survey. The survey asks respondents questions regarding where and how Action Learning is being deployed in industry today.

The collected responses will be kept confidential. The data gathered in this study will be grouped and reported in the form of a summary and will be posted on the designated website for your access after May 15, 2001. To assure anonymity, you will not be asked to sign a consent form. If you choose to participate in this study, your completed questionnaire will serve as your consent. Please take a few minutes of your time to complete the survey in order to complete the survey. You will need to go to the web page at http://sjfc.edu/~maley/comparetta.htm

Thank you very much for your time and assistance with this project. Please feel free to contact my faculty advisor, Dr. Marilynn Butler, or me with any questions or concerns regarding this questionnaire. My e-mail address is cc8027@sjfc.edu. Contact Dr. Butler by phone at (716) 385-8157 or by e-mail at mbutler@sjfc.edu.

Sincerely,

Christopher Comparetta
Appendix B

Invitation to Participate in Study

Survey Questions

According to much of the literature on Action Learning, it can be defined as a process or program with the express dual purpose of solving real world problems and focusing on and enhancing the participants learning experience. The Canadian Chapter of the International Federation of Action Learning describes Action Learning as follows:

*Action learning involves working on real problems, focusing on learning and actually implementing solutions. It is a form of learning by doing. Pioneered by Professor Reg Revans and developed worldwide over the last 40 years. It provides a well-tried method of accelerating learning that enables people to handle difficult situations more effectively.*

*Action learning is a process of inquiry, beginning with the experience of not knowing 'what to do next', and finding that answers are not available through current expertise. When expertise fails to provide an answer, collaborative inquiry with fellow learners who are undergoing the same questioning experience is always available. To be effective, this partnership in learning needs to be both supportive and at the same time challenging, deeply caring yet questioning. Such partnerships actually create themselves when different people with different ideas engage whole-heartedly with each other to resolve each other’s problems.*

**Section A**

Does the process or program you are deploying as an Action Learning consistent with the above definition.  □ Yes □ No

If you answered No to the question above, please answer question A-1 and then hand in survey. If you answered Yes to the question above please proceed to Section B on next page.

**A-1.** If you are deploying a process or program which you refer to as Action Learning but its definition is different from the one provided above, please provide your definition of Action Learning
Section B

Part 1

First, something about yourself:

1. How long have you been deploying Action Learning? __________ years

2. How did you acquire/develop your competency as an Action Learning practitioner { one}
   - From readings (books, journals)
   - Workshops, conferences
   - Apprenticeship
   - Certificate program
   - University/College program
   - Other {please explain}

3. In what country have you most frequently deployed Action Learning { one}
   - Australia
   - Sweden
   - Canada
   - UK
   - Netherlands
   - USA
   - New Zealand
   - Other {please specify}

4. Do you have access to a database of quantifiable successes that demonstrate the potential gains to be achieved utilizing Action Learning?
   - Yes
   - No

5. In deploying Action Learning do you follow the model as defined by Reginald Revans or are you using some variation?
   - Reginald Revans’ model
   - Variation of Reginald Revans’ model
   - Other {please specify}

6. In your practice, do you use the term Action Learning or do you use a different term (e.g. work-based learning, event-based learning, accelerated learning, action-reflection-learning®)?
   - Use the term Action Learning
   - Use a term other than Action Learning {please specify term used}

7. For which of the following have you employed Action Learning { select ALL that apply}?
   - Problem solving
   - Organization learning
   - Professional growth and career development
   - Teambuilding
   - Leadership development
   - Other {please specify}

8. In your deployment of Action Learning, when does reflection occur {please select one}?
   - Continually throughout the activity
   - At the end of the activity
   - Does not occur
Part 2

Action Learning Sets (or groups or teams) consist of the collection of people who have come together in collaborative inquiry to address a problem of set of problems. From your experiences, what is the frequency that you have found that Action Learning Set members

9. have a clear understanding of the constructs and benefits of Action Learning?
   □ Always □ Often □ Seldom □ Never

10. understand the differences between Action Learning and other organization effectiveness initiatives such as task forces, quality circles, TQM, simulations, etc.?
    □ Always □ Often □ Seldom □ Never

11. have an understanding of the importance of reflection to learning?
    □ Always □ Often □ Seldom □ Never

12. demonstrate a competence in interactive and social skills, such as giving and receiving feedback, questioning, and valuing diversity?
    □ Always □ Often □ Seldom □ Never

In many cases, Action Learning occurs within the context of a sponsoring organization. From your experiences what is the frequency that you have found that the sponsoring organization

13. values learning as a key contributor to their strategic success?
    □ Always □ Often □ Seldom □ Never

14. is open to, and encourages, questioning of the way things are normally accomplished?
    □ Always □ Often □ Seldom □ Never

15. has a culture that encourages dialogue as opposed to debate or advocacy in discussions?
    □ Always □ Often □ Seldom □ Never

16. supports empowerment?
    □ Always □ Often □ Seldom □ Never

17. attempts to apply Action Learning to inappropriate problems?
    □ Always □ Often □ Seldom □ Never

18. has an infrastructure for sharing new information and knowledge?
    □ Always □ Often □ Seldom □ Never

19. is committed to take action?
    □ Always □ Often □ Seldom □ Never

continue to next page
20. limits Action Learning participation to only those considered to be high potential management candidates?
   □ Always  □ Often  □ Seldom  □ Never

21. has qualified facilitation in the sponsoring organization?
   □ Always  □ Often  □ Seldom  □ Never

22. has an equal emphasis on action and learning?
   □ Always  □ Often  □ Seldom  □ Never

23. has provided adequate funding (time and money) to train participants in Action Learning skills such as questioning, reflecting, providing and receiving feedback?)
   □ Always  □ Often  □ Seldom  □ Never

Part 3

24. Finally, if you could advance the practice of Action Learning, what would you do? Please list the top 5 things you would do in the spaces provide below.

1. ........................................................................................................
2. ........................................................................................................
3. ........................................................................................................
4. ........................................................................................................
5. ........................................................................................................

Thank you for your time and participation.