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Introduction

Action learning can be an effective way of sharing practice and solving problems across different services, sectors and geographies.

This good practice guide offers an introduction to action learning and tips for putting it into practice. The case studies included here show how healthcare professionals are using action learning to work through a range of issues and challenges that come up in their work to support people affected by cancer.

So what is action learning?
The concept of action learning will be 20 years old in 2018 and principally works by facilitating a small group of people, often called an action learning set (ALS), to:

- Learn from experience
- Share that experience with others
- Offer constructive criticism and advice from their experience
- Use that advice as part of their professional role
- Review actions taken and lessons learned

Action learning is used by many organisations to promote problem-solving and leadership skills within a supportive and structured framework (McCormack et al, 2008; Richardson et al, 2008; Ceely et al, 2008; Plack et al, 2008).

How do action learning sets work?
Action learning sets are small, structured groups, typically consisting of six to eight members. At each meeting, members present an issue from practice, and the group helps the presenter to work on the problem through supportive but challenging questioning, encouraging deeper understanding of the issues involved and new perspectives. This facilitates shared learning and reflection (Lamont et al, 2010).

How do I become involved in an ALS?
Action learning sets exist in many organisations, including Macmillan, as they are recognised as an excellent way for a group of people in similar roles to learn together. If you can’t find an ALS in your area and you are interested in joining one, or starting one up, please speak to your local Macmillan learning and development manager or partnership quality lead.

Do you need training to be an action learning set facilitator?
There is much debate in the literature about whether a ‘trained’ facilitator is required or whether those skills already exist within the workforce. Professor Reg Revans (1998), the originator of action learning, believed that with correct understanding of how it works, an ALS could be run without a ‘trained’ facilitator so long as those facilitating knew the fundamental principles for success, such as:

- How to set up the ALS
- Being disciplined about time keeping
- Understanding the importance of open questioning and listening skills

The facilitator role is pivotal to the success of the ALS, acting as a coach and guiding ALS members to deeper levels of reflection and insight (Sanderson et al, 2006; Robinson, 2001). Talk to your local Macmillan learning and development manager about how to commission an ALS facilitator, or if you are interested in becoming a facilitator yourself.
Five top tips

1. Be committed
   Successful action learning sets stay together because they choose to. Joining an ALS should be voluntary.

2. Come with an appetite to learn
   Participants’ skill levels are not important, but active and enthusiastic participation and commitment to taking action are key to a successful group.

3. Everyone is equal
   For an ALS to be effective, group members should work together as equals. This dynamic is critical and non-negotiable. There should be no hierarchy. Every member’s contribution is equally relevant.

4. Pay attention to detail
   Many action learning sets fail because meetings are not properly arranged. Book diary dates and times in advance and ensure you have full commitment from all members, who should have their manager’s full support to allow attendance. Participants must arrive on time and stay for the entire meeting. Failure to do this is disruptive and can lead to the ALS breaking down.

   Meeting spaces should be private, confidential, informal and free from interruptions. The ideal seating arrangement should be a circle of comfortable chairs. Remove any symbols of hierarchy in the room, for example making sure all the chairs are the same. With good organisation, the right technology, a skilled facilitator and some patience, a virtual meeting can produce great results if face-to-face meetings are not possible.

5. Skilled facilitation
   Whether the facilitator is an externally-trained person or a colleague, good facilitation skills are key to success. Determining a clear contract with members from the outset helps to promote open questions and respectful behaviour, as well as rigour and discipline. There should always be respect, a trusting atmosphere and confidentiality. Equal time for everyone promotes group equality.

Following these tips should make meetings time well spent and enjoyable. When action learning works, it works well, and you will find yourself part of something very special with a wealth of learning, insight and personal growth available to you. Your Macmillan learning and development manager can help you to be part of this.
CASE STUDIES

These examples show how Macmillan professionals in different roles and regions have benefitted from action learning.
I became involved in an action learning set after Tudor Humphreys, Macmillan Partnership Manager for my region, encouraged me to attend a group that he facilitates. Tudor suggested that it would be a good opportunity to explore some of the issues I was facing when running my service. The group is called PRACTISS, which stands for Practical Action for Cancer Information and Support Services.

At the group, I met other managers in the region and quickly found that we faced similar challenges. We all work in relatively isolated roles and sometimes need to deal with complex and distressing situations. The problems we discuss can also include managerial and practical issues, such as coming up against resistance when trying to improve services, or a challenging relationship with a colleague.

You can bring along any issues you have where you need a solution. Ground rules are put on a board at the start of the meeting, including confidentiality. We start by taking it in turns to tell everyone about the issue we have brought with us. This is called a bidding round. We then have an open discussion about the common themes that have been identified, and as a group decide who will present their problem that day.

Those who are not presenting will ask the person open questions about their problem. The aim is to try to help them unpick their own problem in creative ways, and decide on the action they need to take. We are not there to make suggestions or offer any advice.

Being a presenter can feel vulnerable, but at the same time, you know that everyone there is supportive and that the discussion will remain confidential. Any challenges that people pose to you in their questions will come from a place of respect. Sometimes there are periods of silence, and it’s important to let that silence be there and not to jump in too quickly. It’s a reflective process. Tudor facilitates and ensures a safe environment.

The last time we met, we discussed difficult conversations in meetings. I was not the presenter, but the session allowed me to reflect on the issue. The learning I gained helped me to change the dynamic when holding an important meeting with senior trust members. I felt more confident and comfortable without feeling intimidated and therefore represented my service more strongly.

Whenever I go to the group, I feel as though I have offloaded something. It is hard work whatever side of the table you are on, but very worthwhile.
Devon and Cornwall: 
A new way of communicating

Sarah Drake first experienced action learning when she was setting up her own business.

I joined a group of other women and we met regularly over six months with a skilled facilitator to share our challenges and support each other. I was amazed at how such a simple process of listening, asking good questions and not giving advice could make me feel ready to decide what actions I needed to take, especially when I felt stuck.

I went on to train as an action learning facilitator in 2011. Since then I have facilitated many sets and always really enjoy seeing the impact that others have felt on themselves and their work. The magic that can be created by skilled facilitation and a committed group is around ‘holding the space’ in a safe way for a person to present something that they are finding difficult to a trusted group. Each member will feel the support of a small group of peers who are not trying to bring their own experiences but are listening deeply and asking clarifying and challenging questions to broaden the perspective.

Reg Revans was the founding father of action learning and started to use it within the NHS. He said that learning starts with admitting you do not know. Learning arises when there are incisive questions to challenge current thinking. After joining Macmillan last year, I was asked to facilitate an action learning set for Recovery Package project managers. This experience made me understand how difficult it can be in standalone roles and that action learning is a structured way to work on real issues.

There is time to explore progress on actions set at previous meetings, check in with feelings and reflections and tackle current concerns. I have had a lot of good feedback about this process, which for many people is not like any form of human communication they have experienced.

We now have a pilot action learning offer for Macmillan professionals in standalone roles in Devon and Cornwall and I am looking forward to seeing who might like to explore this way of working.

For further information contact Victoria Trundle, Learning & Development Administrator, at vtrundle@macmillan.org.uk

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Merseyside and Cheshire: Turning insight into action

Lou Gelder is an action learning facilitator and trainer.

We started our action learning journey with a six-meeting programme for lead cancer nurses across Merseyside and Cheshire. This was a group of nurses who held quite isolated positions within their trusts. The peer support enabled them to gain momentum on survivorship issues and try to facilitate change within services, and it was essential to build a safe and warm environment. Safe, by establishing a group contract that is owned and reviewed by all, and warm, by starting each meeting with a non-work check-in. This enables meaningful and honest reflection within a peer support and challenge framework, enabling new insights into complex problems. Together with a commitment to undertake some action between meetings and to ‘learn from our attempts to change things’ (Pedler, 2008), this is the essence of the technique.

An important action from this was for Macmillan to work in partnership with the lead cancer nurses and the Clatterbridge Cancer Centre to set up a £1.25 million regional Living With and Beyond Cancer (LWBC) programme. One element of this was to use action learning to innovate new community services. Two groups were established: a commissioners session and a stakeholder group.

Working relationships were built that impacted positively on their work outside of the sets, and the cancer commissioners’ set continued with self-facilitation. Getting the groups to use the space to look at how they would innovate new services and take these forward did not develop as fully as hoped. However, they did lead to greater user engagement and further listening events, which fed into a £1 million investment to widen the LWBC programme to community services.

Alongside this work, four other sets were delivered for cancer managers, benefits advisors, allied health professionals and a group looking at rarer cancers. These sets aimed to bring together groups of professionals who worked remotely to develop shared working practices and innovations under the LWBC agenda.

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Action learning

Merseyside and Cheshire: what we learned

• The invitation list is important. Groups with clear criteria for who should attend flourished.

• Too much attention on local work issues can dilute the focus on any shared group aims.

• Initiatives are often more impactful when attendees have the power and time within the remit of their role to implement them.

• Feeling less isolated and feeling re-assured that others were facing similar challenges were common outcomes among attendees.

• Four of the groups are continuing to meet regularly, two with a facilitator and two self-facilitated. Six meetings are not always enough to build momentum towards shared goals.

• Evaluations showed that people developed confidence in their own ability to work through problems, which supported their continuing professional development.

• Even when people did not share their own challenge or opportunity in a set meeting, they learned about themselves and their practice through listening to others. There is also a benefit from the positive impact of giving to others.

• For some groups, action learning methods helped de-politicise what could have been highly charged discussions.

• Working reflectively suits some people more than others. Feedback is essential to ensure that the group process is meeting everyone’s needs.
Nottinghamshire and Derbyshire: A supportive learning environment

Sue Sanderson and Mandy Edwards share two different perspectives on action learning.

Sue’s experience
Last year, as part of the Recovery Package Leading Organisational Change Programme, three action learning sets were set up to help get to the real heart of issues and challenges around implementing the Recovery Package in the workplace.

As facilitator, I had to be organised and provide a sense of purpose, structure and discipline, but also create an environment and powerful system to support action and learning.

The group comprised seven members, from acute hospitals and commissioning organisations, and across clinical, educational and project management roles, as well as me the facilitator. Ground rules were established at the first meeting and were always revisited at the beginning of each meeting. Together, we all took time to consider what was required to create a supportive learning environment.

An action learning problem brief and set meeting review sheet were circulated for those wishing to think through a suitable problem, opportunity or issue, and reflect on the work of the set respectively.

As we progressed, different action learning methods were offered to gain optimum benefit. The use of questions and feedback (The Five Step Method) were mostly used, and proved both effective and supportive. Reactions were positive and it was unfortunate that the sets couldn’t continue through as group members lacked the capacity to continue meeting on a regular basis.

I know members keep in touch and it would be good to meet again and review developments in relation to their learning.

Mandy’s experience
I participated in the set while in my previous post as Macmillan Cancer Project Lead at Sherwood Forest Hospitals NHS Foundation Trust. Initially I was apprehensive, as I had not been involved in this type of learning before and wondered what the benefits would be for my role and my own personal development.

The set was extremely supportive and after the initial meeting, people became more comfortable and a bond of trust formed within the group, which enabled extremely open and honest discussion. The experience helped me to understand that, realistically, we cannot solve problems on our own, and that listening to and learning from others is a valuable benefit.

Resource and other key issues are common across all organisations and the group discussion enabled everyone to bring their own problems to the table, and to understand and consider how to effect changes back in their own organisations to support the delivery of the Recovery Package.

The action learning set helped me to realise that learning in a group is extremely beneficial and I have felt my confidence grow enormously with the support and encouragement shown by others within the group.

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Improving the Cancer Journey is a Holistic Needs Assessment (HNA) service, providing direct assistance, advice and information to people affected by cancer in Glasgow.

The HNA officer role is highly emotive. When you visit someone, you are absorbing some of their emotions. It’s very important to be able to look after yourself and take time to discuss these things with your colleagues. We’re very lucky to be able to get that time, as part of an HNA action learning group that meets every six weeks.

Our method is one officer will present a case on a whiteboard. Some are complex, some are simple. Then they leave the room and the other officers work out what they would have done for a client in this case. The presenter then comes back into the room and we compare what the other officers would do with what was done for the client in question. This is a good way to learn about different agencies that we can refer cases to.

My experience of action learning has been overwhelmingly positive. It is carried out in a safe, confidential environment where we’re able to discuss and highlight client cases and one-off situations.

You’re offered peer support, professional advice and reassurance, as well as advice on mindfulness to help look after your own wellbeing. It also helps to raise awareness of other roles and remind us of our own limitations, as well as identify areas of development through constructive criticism and continual learning. Action learning has given me more confidence and makes me feel supported. I also know that I’ll learn from the decisions I make.

It’s also a forum to let off steam without any barriers, makes you feel closer to your team members and helps you understand the issues your colleagues are facing every day. You develop a bank of shared knowledge and experiences. That’s a luxury not all employees get.

Improving the Cancer Journey has been running for more than three years and action learning has been invaluable in helping to shape it into a service that we’re extremely proud of.

A problem shared …

One week an HNA officer presented a case involving a 65-year-old man with lung cancer who lived alone, with no family. During his HNA, issues were identified with his breathing, getting around and finances. The officer gave him self-management information on breathing and the benefits of using a handheld fan and Macmillan’s Managing breathlessness booklet. The officer also discovered that poor mobility was preventing him from being able to get upstairs to the bathroom.

In that scenario, the officer would request an occupational therapist assessment for a possible bathroom adaptation, a bathroom to be fitted downstairs or a stair lift. They would apply for Attendance Allowance and a Macmillan grant to help with financial issues.

By presenting this case in an action learning environment, the officer found out about a company who could supply and fit a reconditioned stair lift for around £450 in about one week to ten days. In comparison, an occupational therapist assessment can sometimes take up to four months. This meant that a client’s problem was solved more quickly.
Resources

Further information

Centre for Action Learning facilitation
Facilitating innovation and leadership through the ideas and methods of action learning.
http://www.c-alf.org/

Further reading

Action Learning in Healthcare: A practical handbook
By John Edmonstone
This manual explores the dual focus of action learning as both philosophy and technique, addressing challenges and providing support material.

ABC of Action Learning
By Reg Revans
Revans’ theory of action learning which empowers people to question their own knowledge and to break down limitations in their capacity to learn by consciously putting learning into action.

People Development: An Inside View: Developing Individuals, Leaders and Organisations
By Natalie Ferres, Sean O’Toole and Julia Connell
This book includes case examples from various industry sectors including government, private, not-for-profit and small business.

Learnzone resources

Macmillan professionals
Resources, information and support to help Macmillan professionals in their role.
http://learnzone.org.uk/macprofs/

Professional development
Information on improving your skills, using good practice and developing your role.
http://learnzone.org.uk/stack.php?s=5

Video: making a poster for a conference
Want to explain the benefits of action learning to your colleagues? Fiona Whyte, Senior Learning & Development Manager, takes you through the pros and cons of creating a poster presentation for a conference or event.
http://learnzone.org.uk/blog/articles/article.php?post=129
Action learning

References:


