

The State of the Art of Action Learning Research

Yonjoo Cho (Indiana University)

Toby Egan (Texas A&M University)

WIAL Conference

June 25, 2010



“No learning without action and no action without learning”

(Revans, 1998, p. 83)

Research Purpose

Theoretical Background

Current State

Future Directions

Relevance to Practice

Conclusion



Research Purpose

- To examine the current state of action learning research
- To provide an informative picture for future Action Learning evaluation, research, theory and practice

Researcher Backgrounds:

Strong Practitioner-Scholar Backgrounds and Interests

Action Learning Research

- What's the difference between evaluation and research?
- How has/can research influence organization practice?
- What value is there in conducting research on action learning?
- Does it matter? What does/would make action learning research valuable to action learning practice?

Theoretical Background

- Balance between action and learning (Revans, 1982, 1998)
- Real, work-based issues (Day, 2000; Raelin, 2008)
- Team learning (Revans, 1982; Senge, 1990)

Our Assessment of Current Research

- Cho and Egan (2009) identified 50 empirical studies published from 2000 to 2007
- Garrard's (2007) *Matrix Method*, both a structure and a process for systematically reviewing the literature
- Used the existing evaluation criteria for comparison
- Each study was sorted into one of three categories: action-oriented [A], learning-oriented [L] or balanced [A/L] action learning

Current State: Overview

- 50 empirical studies: 24 learning-oriented, three action-oriented, and 20 balanced action learning
- Varied interest areas and study locations
 - Management, education, leadership as well as HRD and OD
 - Corporation, education, public sector, and SMEs
 - the U.K. and European countries (34) versus the U.S. (7)
- The use of action learning
 - More management development than organizational growth
 - Most research (70%) conducted in the U.K and in Europe was used for development, particularly in education and public sector

Key Issue: Balance between Action and Learning

Revans emphasized the following:

“No learning without action and no action without learning”

- **What does this statement mean?**
- **What does a “balance” between action and learning look like in practice?**
- **What is the potential cost of “imbalance”?**

Current State: Example Studies

- Unbalanced Studies: Learning-oriented (24) and Action-oriented (3)
 - Pedler et al.'s (2005) survey study of action learning in the U.K.
 - More focus on personal development, less on organizational problems
- Balanced Studies: Only 20 studies (40%) among 50 studies
 - Action learning used in executive programs at two U.S. business schools enhanced both individual and organizational outcomes (Tushman et al., 2007)
 - Commonalities: An effective use of learning teams; the use of action learning for both individual development and OD; and KSFs such as time for reflection and management support

Current State: Balancing Action and Learning

So, to the extent that the literature reflects a common “imbalance” between Action and Learning—

What can/should be done?

Future Directions: Research Methods

- Only 17 studies (34%) met common standards quality research (Brown, 1989; Buhi & Goodson, 2007; Dillman, 2007)
- A majority of studies (30) used case study approach
 - A need for advanced approaches to qualitative methodologies (e.g. phenomenology and ethnography)

Future Directions: Research Methods

- In the few quantitative studies (10), survey method and descriptive statistics were frequently used
 - A clear need for multilevel, longitudinal designs and quantitative approaches to data collection and analysis

Future Directions: Theoretical Frameworks

- In the review of literature, action learning-related theories have identified; however, additional theoretical development is needed
- A need to investigate action learning from the perspective of HRD-related theories (e.g. learning transfer and performance)
- In addition, examining action learning through critical theory will enhance our understanding of the contexts explored, particularly to see the link between action learning and organizational learning

Relevance to Practice

- An assessment tool for evaluating balanced action learning would greatly assist future exploration and expansion
- Using virtual learning as a supplementary tool to live learning sets is a new trend for busy and geographically dispersed managers; future studies should take this increased use of technology into account

Conclusion

- An overemphasis on learning in the current state of action learning research implies that the learning effort may not be effectively transferred
- The action-learning balance issue, therefore, is significant as a lens through which to examine the Action Learning literature and practice
- The best next step for anyone involved in the leadership of Action Learning practice is to develop well designed, relatively simple approaches to research oriented Action Learning Evaluation

Appendix 1: Previous Reviews

	Mumford (1985)	Mumford (1994)	Smith & O'Neil (2003)
Selection Criteria	Period: 1971-1985 Books and articles	Period: 1986-1994 Books and articles	Period: 1994-2000 109 journal articles
Categories	Definitions Types Programs Roles for advisers Evaluation	Definitions Management ed. Types Processes Participant learners	Revised Mumford's categories AL fundamentals AL practice: case reviews AL focus: applications
Learning points	The first review of the literature Covered the field opened up by Revans' book (1971)	The growing impact outside UK A major critique of not enough attention to learning process	The "subjective" choice of articles The dual purpose of indicating sources and avenue for research

Appendix 2: Evaluation Criteria for Comparison (Cho & Bong, 2008)

Evaluation Criteria	Action-Oriented	Learning-Oriented	Balanced Action learning
Objective	Organizational problem solving	Personal development and learning	Organizational problem solving & individual learning
Problem	Real business issues	Emergent individual issues	Real business issues
Problem Selection	Top-down or middle-up-down	Bottom-up, Learner-oriented	Top-down or middle-up-down
Sponsor	Actively involved in the entire process	Only involved in problem selection & evaluation	Actively involved in the entire process
Implementation	Follow-up activities provided	Only reference for decision-making	Follow-up activities provided
Learning Coach	Weak recognition SME	Weak recognition HR's check on journals	Full recognition External/internal coach
Reflection	Weak recognition Often not done	Weak recognition Reflection journals only	Full recognition A must activity led by coach
Evaluation	Result-oriented Done by sponsors Low on learning	Learning-oriented Done by HR Low on business results	Balanced action learning Done by sponsors & HR

Appendix 3: Overview of 50 Action Learning Studies

Type	Study (Analysis)	Location (Organization)
Balanced (20)	9 case study (1 mixed) 7 action research 2 evaluation (1 qualitative and 1 mixed) 2 exploratory (qualitative)	6 United Kingdom (4 firms and 2 public sectors) 4 United States (1 firm and 3 educations) 2 Irish firms 2 European Union firms Other: Netherlands (firm), Sweden (firm), Australia (hospital), New Zealand (hospital), Singapore (education), and China (firm)
Learning-oriented (24)	18 case study (1 mixed and 1 quantitative) 3 evaluation (2 quantitative and 1 mixed) 2 action research 1 exploratory (quantitative)	16 United Kingdom (7 educations, 5 public, 4 firms) 2 Ireland (education and public) 2 Australia (educations) Other: United Kingdom and United States (firm), United States (education), Netherlands (firm and hospital), and New Zealand (firm)
Action-oriented (3)	2 case study 1 qualitative study	2 United Kingdom (1 firm and 1 education) 1 France
NA (3)	1 case analysis 1 quantitative 1 survey study	1 United States (firms) 1 Netherlands (firms) 1 Asia-Pacific countries (business students from New Zealand, Australia, China, Singapore, and South Korea)

Q&A

Thank you!