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# Does Action Learning Promote Collaborative Leadership?

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## **Does Action Learning Promote Collaborative Leadership?**

### **Abstract**

Given the need to unlock the capacity of everyone in the organization, there is a growing interest in collaborative leadership. But how is such a practice developed? In this article, the author proposes the use of action learning – in its original formulation, namely through reflection on real work experience dealing with unfamiliar problems – as a gateway to collaborative leadership. Action learning is portrayed as growing in acceptance as a management education and learning approach that distills knowledge from a context to be used to provide learning to the practice as well as to the practitioner. The account demonstrates how the operating practices of collaborative leadership are directly affected by action learning and proposes that the two approaches are based on common principles.

### **Introduction**

There is a growing fascination in this new century with collaborative models of decision making and especially with collaborative leadership. The reason seems to be an appreciation for the need to unlock the capacity of all our people to contribute. Rather than rely on a coterie of subordinates to await their marching orders from detached bosses, there is a need for organizations to empower anyone who is capable and who has the willingness to assume leadership in the moment in his/her relationships with peers, team members, customers, suppliers, and other organizational partners.

Along with this fascination with collaborative leadership has been a comparable fixation on leadership development. One of the newer models of leadership development that has gained growing popularity in North America, though it has long been practiced in Europe and Asia and especially in the UK, is action learning. Rephrasing the words of its original architect, Reg Revans (1982), action learning is a method to generate learning from human interaction occurring as learners engage together in real-time work problems. Learning arises not just from representations of conceptual material but from questioning among fellow learners as

they tackle unfamiliar problems. Over time, action learning has become associated with the performance of a team on a critical project assigned from a corporate sponsor. In the impetus to get the project accomplished, the questioning that Revans had in mind - what we might also refer to as collective reflection – has often become overlooked.

Not only has reflection often received short shrift in action learning, but the project, when conceived as part of normal business practice, is not thought to inspire behavior that falls outside of normal operating expectations (Garrick and Clegg, 2001). Participants work on their projects conforming to conventional organizational standards that do not necessarily endorse a change in leadership style. Hence, the answer at first glance to our title, “does action learning promote collaborative leadership?” would be expected to be “no.”

Yet, if we add back the original conditions that were specified by Revans, that projects entail reflection on practice under unfamiliar conditions, there is the chance that action learning may produce a different style of leadership among its participants than more conventional classroom methodology. The reference to unfamiliar conditions was Revans’ way of referring to “stretch” conditions that precipitate reflection and learning. The two stretch conditions could be either: a) using methods and practices familiar to the participant in different settings – such as in a different department from one’s present unit or even a different organization, or b) using different methods – such as the balanced scorecard rather than more standard financial measures – in the same setting. In either instance, the leadership of the participants and the surrounding stakeholders is likely to evince more collaborative behavior. The main purpose of this paper is to illustrate how and why this might be so. To begin, I will briefly describe action learning followed by what I mean by “collaborative leadership.” Then I will amplify the central thesis that these two emerging approaches are related and that, indeed, one leads to the other. This will require an exploration into their common principles at different levels of experience followed by explicit reference to their unifying practices. I will next turn to indices and methods to assess whether action learning produces a more collaborative form of leadership and practice. I will conclude with some thoughts on the imperative underlying the establishment of collaborative models of learning and leadership.

## **Action Learning**

There are many variants of action learning, but all seem to have three common principles (Raelin, 2000):

- That learning be acquired in the midst of action and dedicated to the task at hand.
- That knowledge creation and utilization be seen as collective activities wherein learning can become everyone's job.
- That its users demonstrate a learning-to-learn aptitude which frees them to question the underlying assumptions of practice.

In its operation, action learning is typically applied in a group setting that seeks to generate learning from human interaction arising from engagement in the solution of real world work problems (Pedler, 1996, Marquardt, 1999, Raelin, 2000). Although action learning theorists can appreciate the value of "active" learning strategies that bring a sense of live experience into the classroom through cases, simulations, and the like, they contend that the best way to test theories and make them actionable is through real experience. As suggested earlier, in Revans' original conceptualization, learning results from the independent contributions of programmed instruction (designated P) and spontaneous questioning (designated Q) (Revans, 1982, 1998). P constitutes information and skill derived from material already formulated, digested, and presented typically through coursework. Q is knowledge and skill gained by apposite questioning, investigation, and experimentation. Most action learning theorists consider Q to be the component that produces the most behavioral change since it results from reflection on experience. The reflection is bolstered by feedback from mutual learners who participate in a real-time debriefing of the learner's workplace experiences. Q also offers the advantages of connecting with the participant's prior knowledge and practice, of stimulating growth at the participant's current stage of development, and of providing intrinsic feedback from the work itself rather than from an external authority.

In a typical action learning program, a series of presentations constituting programmed instruction might be given on a designated theory or theoretical topic. In conjunction with these presentations, managerial participants might be asked to apply their prior and new knowledge to a real live project which is sanctioned by organizational sponsors and which has potential value not only to the participant but to the organizational unit to which the

project is attached. Throughout the program, the participants continue to work on the project with assistance from other participants as well as from qualified facilitators or advisors who help them make sense of their project experiences in light of relevant theory. This feedback feature principally occurs in learning teams or "sets," typically composed of 5-7 participants that hold intermittent meetings over a fixed program cycle (Smith and O'Neil, 2003). During the learning team sessions, the participants discuss not only the practical dilemmas arising from actions in their work settings, but the application or misapplication of concepts and theories to these actions.

Hence, actions taken are subject to inquiry about the effectiveness of these actions, including a review of how one's theories were applied into practice. Participants learn as they work by taking time to reflect with like others who offer insights into their workplace problems (Raelin, 1997). In this way action learning addresses the pitfalls of conventional training that often overlooks the need to surface tacit knowledge to convert it to learning. By having peers serve as a sounding board to one another regarding the operating assumptions underlying project interventions, participants become more equipped to produce the outcomes they desire (Argyris, and Schon, 1996). They learn from each other how to overcome the blockages that they themselves and others erect to deter project accomplishment (Coghlan and Brannick, 2001). Their learning is tied to knowledge collectively and concurrently co-constructed in service of action (Tsoukas, and Mylonopoulos, 2004).

The project undertaken in action learning does not necessarily solve the initial problem that was presented by the sponsor. The potential solution that the individual or team comes up with may not work or may not be endorsed. Perhaps the team came up with a solution, but one that addresses another problem. Nevertheless, action learning works if it is comprised of participants: (1) who care about the problem, (2) who are given the authority to work on it at their own discretion even to the point of being transformed by participation in the project, and (3) who are committed to inquiring about the most fundamental assumptions behind their practices (Pedler, 1996). What is critical is that the experience confront learners with the constraints of organizational realities, leading oftentimes to the discovery of alternative and creative means to accomplish their objectives.

Consider the case (introduced in Raelin, 2000, p. 208) of a new registrar, named Maggie, of a museum service in a large city in the UK. The Museum Service comprised four separate

museums plus a large art gallery. As registrar, Maggie was given the responsibility to upgrade the Service's collection standards in order to qualify for national registration and receive funding aid. The enhancement of the Service's collections became Maggie's project for the year. In working through this project, Maggie exemplified how an action learning student experiences each of the aforementioned changes.

1) She became part of the problem. Maggie reported that initially she began her project more as a consultant than as a member of the staff. She realized that to be effective, she would have to adopt a role in which she would be seen more as "one of them." As she became aware of the gap that existed between herself, a motivated young woman, and the comfortable, settled, middle-aged "men with their cardigans," she began to reframe the situation. She came to think of herself as being a "learning manager" in a "non-learning organization." Thinking of herself in these new terms considerably helped her to formulate new actions she could undertake to positively influence the organization.

2) She became transformed. As her project evolved, she began to see that she herself was using ineffectual attributions to characterize her staff. For example, through reflective dialogue in her learning team, she became aware of her observation that her colleagues were unable and unwilling to change, graphically captured in the phrase, "Old men in cardigans waiting for retirement." In her own words, Maggie noted:

Following discussion in my set, I reflected and realized I needed to look again and re-interpret my observations. I found I came to appreciate more clearly the staff's situation.

3) She experienced double-loop learning. In double-loop learning, participants seek to inquire about the most fundamental assumptions behind their very practices, even the governing values of the systems of which they are a part. One of Maggie's interventions was to initiate an extensive training program for staff, but in order to make it useful, she had to overcome a widely shared perception that training was a "waste of time." Again, through assistance from her learning team, she reformulated training as something more than teaching and instruction; it could also serve as a tool for community building, bringing together groups and individuals in the Service who had never met. Further, by rotating the training venues among the Service's different museum sites, staff could be given the chance to visit sites in the same city that until then, many had never seen. Better working relationships

evolved among the staff and Maggie established vital contacts with both internal and external training providers and other stakeholders throughout the city.

Besides action learning's individual and interpersonal applications, its exponents also claim that it can produce institutional change since it represents a form of intra- and inter-organizational learning (Lawrence, Hardy, and Phillips, 2002). Over the course of time, especially when action learning program managers attempt to collect, store, and disseminate the knowledge originating from projects, action learning can add to an organization's institutional memory. The sharing of knowledge and practices can transfer intelligence across generations of employees. Further, as activities seep into organizational practices, there is the genuine opportunity for shifts in culture to occur as well as performance improvements.

Mike Marquardt (2004) reports on a bilateral action learning project at a plant in the northeast of the United States joining members from both National Semiconductor and AT&T. The team was commissioned at the initiative of senior managers from National Semiconductor who were concerned about declining service levels that were putting the supplier at risk of being replaced. Meeting two days a month for three months, the team came up with a list of some 40 recommendations, leading to a number of key initiatives, such as:

- Reframing the reasons for and then addressing delivery misses
- Increasing the frequency of lead-time updates
- Creating critical device lists
- Developing "Pre-Alert" reports

Within a year following the implementation of these initiatives, AT&T announced National Semiconductor as one its "world-class" suppliers.

Various research accounts have placed the business-wide return on investment from action learning as anywhere from five to 25 times its cost (Alder, 1992; Fulmer and Vicere, 1996; Brennehan et al., 1998; Raelin, 2000). These ratios are largely calculated on the basis of costs removed or savings generated from project work. Later in this article, we will also consider how to calculate the benefits of individual and institutional learning. From most accounts in the domain of executive development, it appears that action learning is growing in popularity and is being deployed across a wide range of business applications, such as: early career programs, new manager assimilation, skill development, high-potential development, team effectiveness, continuous improvement, knowledge management, and



organizational transition (Vicere, 1998; Fulmer, Gibbs, and Goldsmith, 2000; Delahoussaye, 2001; Martineau and Hannum; 2003; Hernez-Broome and Hughes, 2004).

Although action learning has been largely applied within corporate settings, it has gained a foothold in the academic world as well, especially in business and management schools. The impetus for this transition has come as much from employers as from academic faculty. Employers expect graduates to find knowledge within a context and use that knowledge to improve work processes and outcomes. Relying on classroom learning that can solve a business case but not a current workplace problem is no longer thought to be sufficient.

There are only a handful of programs focusing on action learning per se, but many masters and even doctoral programs are introducing action learning methods into their disciplinary content (see, e.g., Adler et al, 2004; Coghlan et al., 2004). These programs appear to appreciate action learning's focus on praxis or experimentation in a practice field that gives rise to knowledge through systematic means of inquiry. In the world of action learning, the faculty member's role is paradoxically to step back from the center and serve as a facilitator of the student's self-learning and self-discovery (Hunt and Weintraub, 2004). As Dehler (forthcoming) suggests, the point of learning in this setting is to prepare students for informed action in their work rather than a passing grade in a course. To do so, students will often enter the program as a cohort, using each other as a sounding board on their learning goals, and will typically work on a change project of direct relevance to their employing organization. In this way, they develop the critical collaborative skill of reflection-in-action rather than just reflection-on-action.

### **Collaborative Leadership**

There are certainly as many ways to characterize collaborative leadership as there have been ways to depict action learning. Again, let's consider some of its fundamental principles and then look at some critical ways to think about collaboration in operation.

Collaborative leadership in all its forms rests on a fundamental humanistic principle. It can be simply stated as follows: When people who have a stake in a venture are given every chance to participate in the venture, including its implementation, their commitment to the venture will be assured (Bennis, Benne, and Chin, 1961; Vroom and Yetton, 1973). No matter what form the behavioral change may take – be it through participative management,

total quality management, organizational learning – collaborative leadership requires true participation in leadership and decision making at all levels and in multiple decision processes (Glew et al., 1995).

There are three additional principles associated with collaborative leadership that are worth modelling:

- Collaboration begins any dialogue with a stance of nonjudgmental inquiry (Argyris and Schön, 1978; Putnam, 1999; Marshak and Katz, 2001).
- It requires submitting one's own ideas and views to the critical scrutiny of others (Bateson, 1972; Habermas, 1984).
- Collaborators need to entertain the view that something new or unique might arise from a mutual inquiry that could reconstruct the participants' view of reality (Schön, 1983; Checkland, 1985; Senge, 1990; Mezirow, 1991; De Bono, 1994; Engestrom, Miettinen, and Punamaki, 1998).

Associated with these principles are four operating perspectives that I believe to be critical in establishing a practice of collaborative leadership. These have been introduced in Raelin (2003) underlying a shared model of leadership that has also been referred to as “leaderful” practice. The four perspectives call on leaders to be: concurrent, collective, mutual, and compassionate. The first perspective, that leaders be concurrent, stipulates that there can be more than one leader operating at the same time in an organization so leaders willingly and naturally share power with others. Indeed, power can be increased by everyone working together (Tannenbaum and Schmidt, 1958). Since leaders perform a variety of responsibilities in an organization, it may be counterproductive to insist that there be only one leader operating at any one time. For example, an administrative assistant, who “knows the ropes” and can help people figure out who is knowledgeable about a particular function, may be just as important to the group as the position leader. However, this same position leader does not “stand down” nor give up his or her leadership as members of the group turn their attention to the administrative assistant. The two of them as well as many others can offer their leadership at the same time.

Collaborative leadership is not only concurrent, but is also collective. Since a group can have more than one leader operating at a time, we can conclude that people might be

operating as leaders together; in other words, that leadership is a plural phenomenon. The collective view purports that leadership does not derive from individual influence as it does from the process of people working together for a common purpose (Drath and Palus, 1994). According to this interpretation, anyone may arise to serve the group's leadership needs. The entity is not solely dependent on one individual to mobilize action or make decisions on behalf of others. I include in this assertion the role of the position leader. This "authority" may have formal power conferred on him or her by the organization, but formal authority is not necessarily the most valuable to the operation (French and Raven, 1960). Decisions are made by whoever has the relevant responsibility. Leadership may thus emerge from multiple members of the organization especially when important needs arise, be they preparing for a strategic intervention, creating meaning for the group, or proposing a change in direction. Although someone may initiate an activity, others may become involved and share leadership with the initiator.

Consider a team temporarily stymied in its attempt to solve a problem. Feeling disconsolate, members wonder if they will ever find a solution. Then, all of sudden, some member offers an idea, perhaps not a mainstream idea but one that has an immediate appeal, which engages everyone's imagination. Soon, others begin throwing out additional thoughts and tactics to build on the original idea. For a time, there is almost a breathless quality to the team's functioning as it becomes absorbed in this all-encompassing solution process. The team is experiencing collective leadership; it is not dependent on any one member, not the position leader, not the idea initiator; everyone is participating. Further, the collective nature of leadership illustrated here incorporates the critical components of learning and meaning-making. Team members used their conversation to invent new ways to attack a problem and collectively made sense together from what once was a state of "not-knowing" (Baker, Jensen, and Kolb, 2002; Kayes, forthcoming).

Collaborative leadership is also mutual. All members of the organization, not just the position leader, are in control of and may speak for the entire organization. They may advocate a point of view that they believe can contribute to the common good of the organization. Although they might be assertive at times, they are equally sensitive to the views and feelings of others and consider their viewpoints to be equally valid. They thus seek to engage in a public dialogue in which they willingly open their beliefs and values to the scrutiny of others (Raelin, 2001). They also understand the difference between collaborating as a pretense versus becoming fully involved. In pretentious involvement, one

quickly discovers that all the critical decisions seem to be made when one is absent. Collaborative leaders realize that everyone counts, every opinion and contribution sincerely matter (Block, 1996)

Finally, collaborative managers are compassionate. By demonstrating compassion, one extends unadulterated commitment to preserving the dignity of others. Stakeholders' views are considered before making a decision for the entire enterprise (Freeman, 1984; Donaldson and Preston, 1995; Walker and Marr, 2001). Each member of the organization is valued regardless of his or her background or social standing, and all viewpoints are considered regardless whether or not they conform to current thought processes (Nair, 1996). In practicing compassion, leaders take the stance of a learner who sees the adaptability of the organization as dependent upon the contribution of others. Members of the organization, not necessarily the position leader, handle problems as they arise. Compassionate leaders recognize that values are intrinsically interconnected with leadership and that there is no higher value than democratic participation (Heifetz, 1994; McLagan and Nel, 1995). The endowment of participation extends to the wider organization affected by the actions of a given organization (Preston and Post, 1975; Carroll, 1981; Waddock, 2002). If building a new corporate complex will affect the existing ecology or serenity of a neighboring property, the compassionate leader will include the neighbors in deliberations concerning the construction.

### **Action Learning and Collaborative Leadership**

As compared to traditional hierarchical training methods, as we have seen, action learning emphasizes organizational members learning in the very midst of their activity, learning collectively with their peers, and engaging in dialogic approaches that allow public questioning of the underlying assumptions of practice. Meanwhile, collaborative leadership is characterized by a stance of nonjudgmental inquiry, is receptive to the critical scrutiny of others, and assumes the view that something new or unique might arise from a dialogue that could reconstruct the participants' view of reality. These principles will be shown in the sections to follow to link action learning to collaborative models of leadership at different levels of experience – individual, team, and organization. I will also suggest the likely sources of agency for change leading to collaboration. Though institutional forces on their own can affect cultural outcomes, the evolution toward a culture of learning and participation

can be mobilized by internal and external change agents operating at different levels, as Table 1 illustrates. Lastly, I will consider how and why the operating practices of action learning and collaborative leadership are consistent.

Table 1

Agents of Change Toward Collaborative Organization by Level

Level	Agent
Individual	Coach
Group	Facilitator
Organization	OD Consultant

### The Principles and Practices Establishing the Link

The first principle of action learning is that it occurs in the midst of practice and is, indeed, a concurrent by-product of practice. We learn as we attempt to coordinate our activities with others in our work environment. Action learning participants need not take reality for granted; rather, they construct their own reality individually and collectively as they work on their problems (Berger and Luckman, 1966; Gergen, 1999). Although abstract knowledge can assist them, they tend to rely on the context – its culture, its expectations, its tools, and other institutional arrangements - to help them solve challenging workplace dilemmas (Lave and Wenger, 1991). The gateway into the world of contextualized practice is typically through inquiry with others. We don't tend to respond by consulting the latest theory; rather,

we consult with others to see what has worked or what hasn't worked. In this way our learning becomes collaborative.

As practitioners work and learn with others, they need to experience the give-and-take of inquiry, if they are to be effective. Since the root of the problem may not be known in advance, there is a need for inquirers to be nonjudgmental and to be relatively equal in status. Certainly on given topics, particular individual will have different degrees of expertise. But expertise is rarely exclusive and can also be ephemeral as problems become increasingly complex and multifunctional (Ackerman, Pipek, and Wulf, 2003). Although it is possible for one or a few persons to dominate, generations of group process research suggest that solutions will be far more robust as other members variably get involved in the process and participate as part of a collaborative venture (Lewin, 1951; Cartwright and Zander, 1953, Dyer, 1987; Forsyth, 1999). These principles are operative at the individual, group or unit, and organizational or institutional levels of experience.

*Individual Level:* Action learning promotes individual transformation that relies upon a relaxing of people's need for control within social settings. As a participant in a variety of interpersonal sequences, one learns that a viewpoint is just that. It is no more than a hypothesis for action (Argyris and Schon, 1974, 1978). This posture, however, can place the speaker in a vulnerable state since rather than defend a point of view, one assumes a reflective response. The reflective response can be characterized by a number of attributes that are in direct contrast to a control position (Bell, 1998):

- instead of maintaining unrealistic standards - one sets realistic expectations
- instead of expressing trepidation - one displays tolerance
- instead of concentrating on self-expression - one engages in deep listening
- instead of being self-absorbed - one conveys humility
- instead of feeling out of depth - one feels open to learn
- instead of feeling out of context - one becomes open to experience

It is thought that action learning can also increase people's capacity to collaborate because of its effect on participants' intrinsic motivation (Passfield, 2002). In particular, participants are stimulated by the experience of peer challenge and support, by feelings of empowerment as they gain access to people and information, and by the growth opportunity of working on

personal learning goals outside of their comfort zone. These internal processes can, in turn, produce greater self-efficacy along with heightened states of autonomy, meaning, and responsibility.

Of the many programmatic features available in action learning, perhaps one-on-one coaching is the most apt vehicle to promote individual receptiveness to a collaborative model of behavior. The achievement of coaching or mentoring, in turn, stems from its practice as a medium for reflection and learning. The parties commit to exploring the social, political, and even emotional reactions that might be blocking their own operating effectiveness (Raelin, 2000). Otherwise confidential issues, be they working relationships with other managers, strategic business issues, or the participant's own growth and development, are given a forum for open consideration (Allen, Poteet, and Burroughs, 1997; Kilburg, 2000; Hargove, 2003). Individuals get a rare opportunity to think out loud and receive constructive feedback on critical and even undiscussable problems (Kram, 1985; Witherspoon and White, 1996).

*Team Level:* By its very process, action learning takes place within a learning team environment. During any given session, members can be observed listening intently to one another, posing questions, and offering suggestions to other team members whose project is under scrutiny. Occasionally, the focal member might just sit back and listen as other team members brainstorm ideas regarding his or her issue or project. Participants often decide to experiment with new approaches in light of the group discussion, leading to new theories or ideas to be tested in the intervening periods between meetings. The experience is designed to encourage participants to challenge their own views and behaviors and become critical about actions in their own organizations. Some sponsoring units may not be initially hospitable to the probing that characterizes the dynamics of this form of learning. Hence, participants appreciate the opportunity to test their ideas and examine their values and assumptions in the learning team. With the help and encouragement of their team members, especially their facilitator, they can also try out some new interpersonal skills or managerial competencies based on reframed assumptions derived from public reflection within the team (Dixon, 1990; Raelin, 2000; Marquardt, 2004).

The role of the facilitator in the action learning team is critical to change agency (Raelin, 2000). The facilitator observes the team during learning team meetings and provides feedback both to individual members and to the team as a whole on its interpersonal processes. The facilitator is not thought to be a classic meeting moderator. Rather,

facilitators, through their process consultation, seek to ensure that the members of the team maintain ownership of their own agenda and increase their capacity for reflection on the consequences of their own actions. For instance, the facilitator might lead a discussion or reflection session, if requested by the team, to deal with a particular issue the team has not been able to resolve on its own (e.g., a repeated absence of a member, a theoretical question, an unproductive pattern of interaction). Ultimately, these issues will gradually fall upon the team members themselves to manage collectively. They need to choose how they wish to share the team leadership to produce the most value from the experience.

*Organizational Level:* At the organizational or institutional level of experience, action learning practices may systemically or informally diffuse both within the sponsoring organization, and in some cases, across the organization into other stakeholder entities. For example, since action learning promotes strategic change through its project structure, senior sponsors are obligated to work with their own peers to develop interesting ideas, monitor progress, and disseminate results. Through this process, they too learn to challenge existing mindsets and to dialogue across their own subcultural boundaries (Schein, 1993). Moreover, because of the emphasis on reflective conversation, action learning has the capacity to change the nature of stakeholder relationships toward more sustainable partnerships based on generative learning (Senge, 1990).

Institutional agency refers to social actions that potentially change institutions without necessarily requiring the activity of a single individual. Rather it is about the dynamic interplay between social actors and the systems they occupy (Giddens, 1984; Scott, 1995; Karnoe, 1997). There is also growing appreciation that everyday social practices define learning as much as the agency of hierarchical teachers or managers (Leont'ev, 1978; Engestrom, Miettinen, and Punamaki, 1998; Sawchuk, 2003). Nevertheless, institutional change can be mobilized by organization development (OD) consultants and other change agents who encourage the endorsement of a culture of learning within the organization (Senge, 1990; Rothwell, Sullivan, and McLean, 1995; French, Bell, and Zawacki, 2000). Such a culture makes it acceptable to dialogue openly about such "undiscussables" as: unpopular views, defensive routines, conflicts of interest, or intellectual property rights (Pedler, 2002). In addition, these OD change agents can attempt to mold structures and systems that tolerate dissent and encourage open communication. They are also aware how cultural artifacts of the organization, be they longstanding stories about cult figures, live



examples of new behavior, or rewards that reinforce collaboration can powerfully symbolize cultural norms.

Consider the oft-told story about the millwright that is known throughout office furnisher maker, Herman Miller (De Pree, 1989). It is used to promote Herman Miller's value of honoring the integrity of the individual and, in particular, the diversity of people's gifts, talents, and skills. D.J. De Pree, the founder of the company, would visit the family of any key employee who passed away. He would go to their house and spend time in the living room typically in awkward conversation. One day the millwright died and he went to the home of the widow. In this instance, she asked D.J. if she could read some poetry aloud. He agreed, so she read some selected pieces of beautiful poetry. When she finished, the young De Pree commented on how poignant the poetry was and asked who wrote it. She replied that her husband, the millwright, was the poet. D.J. always wondered, as do many others at Herman Miller, whether this man was a poet who did millwright's work or whether he was a millwright who happened to write poetry.

In action learning, there is the expectation that there will be synergy across these levels of experience – individual, group, organization – to produce a lasting collaborative effect. To put it succinctly, collaborative leadership emanates from intrinsically motivated people reflecting with trusted peers as they work across subcultural boundaries on individual and organizational goals.

Let's consider next how the operating practices of collaborative leadership are produced by action learning.

### Concurrent Leadership

Professing that leadership can be exhibited by more than one person in the group at the same time, concurrent leadership is arguably the most radical proposition in collaborative practice. At the early stages of the life cycle of any team or organization, it is unlikely that inexperienced members will agree cognitively or behaviorally with this proposition. Hence, they may need encouragement, evidence, and practice to arrive at this form of participation. Action learning typically calls for the early involvement of facilitators to assist members of the group and the group as a whole with their development. Whether formally or intuitively, facilitators at the outset of their experience need to assess what we may refer to as the

“readiness level” of the team (Hersey and Blanchard, 1988; Armenakis, Harris, and Mossholder, 1993). How prepared are its members to share leadership with one another? Do they need to rely on one person to assume standard leadership responsibilities? Who will see to it that the best use will be made of the team’s resources, that the strengths and weaknesses of the team members will be recognized? Who will provide support to team members in need? Who will be concerned with fostering team spirit? Who will explore and report on opportunities outside the group?

These leadership issues are learning issues. Action learning does not insist that they be lodged within any one person; rather they become the knowledge responsibilities of the entire team. In other words, what is critical is that the key responsibilities of the team to ensure its integrity and performance get done (Kozlowski et al, 1996). There is no advance specification as to which person or role occupant accomplish them. They are learning requirements that the team as a whole must attend to. As they are learned, involving practice and gradual mastery, concurrent leadership becomes more than an aspiration; it becomes a reality.

It should be pointed out that the facilitator, though an important agent in action learning, is not responsible for all the learning in the team. Although a facilitator may be a coach to team members, he or she would not be the only coach. Each member of the team has a personal responsibility to develop himself or herself, naturally with the help of other team and organizational members as well as the facilitator. This can start with the individual’s own self-leadership (Manz and Sims, 1991). One of the practices of self-leadership is to develop a personal development plan (PDP). Accordingly, the individual decides which knowledge, skills, and competencies he or she may wish to develop, makes them known to others in the group, and, often working with a coach or mentor, explains how these skills might be acquired. PDPs can incorporate a range of skills and abilities, be they the most simple to the most complex, technical to non-technical, attitudinal to behavioral. So, for example, an individual may need to monitor her tendency to interrupt others before they finish their explanations and may need feedback to inform her when she may unwittingly be speaking over someone else. Another individual may need to learn new project management skills so as to more carefully map the scheduling requirements of a team project. In each instance, the individual may solicit coaching or mentoring from people outside the team as well as from those within. It is thus possible to have different coaches depending upon the skill domain in question.

Another panoply of skills afforded through action learning that contribute to concurrent leadership are those that fall under the general domain of group dynamics. Understanding how groups develop and the specific interpersonal skills that members need to use is part of the “curriculum” in any action learning experience. In particular, participants are placed into project teams and learning teams to work and reflect together on their collective processes and accomplishments. They need to learn how to divide up the work fairly, how to support one another for the good of the team, how to decide what they need to do to function as an effective unit, or how to develop a sufficient level of trust to commit to one another (Hackman, 1990). It is only when teams become prepared to take control of their own tasks that they no longer need managerial control. It is at this point that they become self-managed without the need for a dominant leader (Kirkman and Rosen, 2000). Each member can exert requisite control when needed. This may include the critical boundary function of the group, the function that gains access to and screens information for the team and helps it obtain outside resources (Fisher, 1993). Although this function typically resides with the position leader, it need not, especially when the outside resource is a professional body or stakeholder more known to specialists within the team than to the named supervisor.

Former CEO of Southwest Airlines, Herb Kelleher went as far as to say that lodging control within a single supervisor or executive would not only be a form of learning deprivation but a strategic blunder. Here are his own words:

A financial analyst once asked me if I was afraid of losing control of our organization. I told him I've never had control and I never wanted it. We're not looking for blind obedience. We're looking for people who on their own initiative want to be doing what they're doing because they consider it to be a worthy objective. That I cannot possibly know everything that goes on in our operation - and don't pretend to - is a source of competitive advantage. The freedom, informality, and interplay that people enjoy allows them to act in the best interests of the company (Kelleher, 1997).

### Collective Leadership

Having considered the concurrent perspective of leadership – that it can be practiced by members of a team at the same time, it is not a leap of faith to view leadership as something that the entire community does together. In such a setting, everyone is challenged to learn; no one needs to stand by in a dependent capacity. Accordingly, organizational members willingly seek feedback, openly discuss errors, experiment optimistically with new

behaviors, reflect mutually on their operating assumptions, and demonstrably support one another (Argyris and Schön, 1978; Reddy and Jamison, 1988).

Action learning sustains collective leadership through the discipline of reflective practice. Participants assemble into learning teams where they begin to question one another about their project experiences. In due course, they also extend their inquiry to each other's professional and personal experiences. They develop a peripheral awareness of others. They come to know learning as a collective process that extends beyond the individual. In the learning team the questioner learns as much as the speaker; indeed, the entire group learns to learn together as all members become mutually responsible for the decision and actions of the team (Marquardt, 1999; Raelin, 2000).

Learning can be accomplished, then, just-in-time and in the right dose to be helpful to practice (Hiemstra and Brockett, 1994). Furthermore, it does not have become disassociated from the notion of place. It can be designed to assist leaders in navigating through the cultural and political land mines of their own organization. It can be dedicated to solving actual problems faced by the business in question. Action learning also endorses the practice of 'double-loop' learning, learning that probes to the underlying assumptions and even premises behind planned strategies (Argyris and Schön, 1974; Mezirow, 1991). People learn to question what might even be considered sacred (Isaacs, 1999).

Consider the use of a targeted action learning process at mammoth Johnson & Johnson, a broad-based health care company, itself comprised of nearly 200 distinct operating companies. Former CEO, Ralph Larsen, introduced its FrameworkS strategic process, the capital 'S' signifying the multiple frames through which a strategic team could view its project mission. According to the process, the company would invite ten to twelve people from its various operating divisions to join the executive committee in a significant strategic undertaking. The new team members would be chosen for the geographic, technical, or organizational perspective they could bring to bear on the issue at hand. They were not necessarily high-ranking executives as much as people with various talents to add value to the project deliberations. The team typically would go off to a remote location for a week to work on the project. Meetings were run democratically with no one imposing rank or exerting status privilege. After the initial gathering, additional subcommittees and task forces were organized to continue to research the issues and take the necessary actions. FrameworkS teams have accordingly steered the company into new markets, new

technologies, new businesses, and even new values (such as their "what's new" program focusing J&J on innovative practices). FrameworkS was viewed as successful because of its collective learning that widened Johnson and Johnson's reach into strategic avenues previously unexplored (Laurie, 2000).

In action learning interventions, such as J&J's, participants become partners in creating and expanding the sources of knowledge. As they work through their own problems, they also seek to participate in creating meaning for their unit and organization. Meaning emerges collectively as ideas are articulated within the flow of the group as it performs its work.

### Mutual Leadership

Action learning models mutual leadership through the three explicit principles of collaborative leadership cited earlier. First, it models dialogic processes that take a stance of nonjudgmental inquiry. Participants are encouraged to express genuine curiosity about others' suggestions and to avoid maintaining hidden interests. The principal interest is in a salutary outcome across individual, group, and organizational levels of performance. Second, they are encouraged to submit their own ideas and views to the critical scrutiny of others. In this way, they become receptive to challenges to their own ways of thinking, even to discovering the limitations of how they think and act. Third, they entertain the view that something new or unique might arise from a mutual inquiry that could reconstruct everyone's view of reality in an entirely new way. They are willing to disturb their own preconceived world views on behalf of a common good.

So, mutual inquiry invites all members of a community to come into the circle and fully advocate their views, but to be prepared to listen to and deeply consider those of others. As such, it recognizes that the contribution of each member of the community, no matter what his or her social standing, can only arise from civil dialogue that permits open disclosure of each person's beliefs, feelings, and assumptions (Habermas, 1984; Ford and Ford, 1995; Isaacs, 1999). As a leadership development approach, it teaches humility at the outset because it is practitioner-centered, not trainer-centered (Smith, 2001). No one has all the answers. Indeed, even the questions must be mutually re-discovered. The speaking referred to here is, thus, reciprocal leading to the production of new and lived realities (Gadamer, 1975; Phillips and Hardy, 2002).

Action learning is also concerned with collaborative inquiry since it calls for engagement by participants in action projects that often involve challenges to the status quo, in particular to the operating conditions in the participants' own organizations. As such, projects may end up questioning familiar political and social relationships in the organization. Indeed, action learning participants typically become avid questioners, not only of their own local culture but of conditions outside their operating purview (Beatty, Bourner, and Frost, 1993). Projects tend to take on a life of their own and, at times, even diverge from the question originally posed to the team. Action learning projects, then, require an organizational culture of risk taking and openness that permits occasional surfacing of ineffectual or insensitive rules and practices (Weinstein, 1995; Reynolds and Vince, 2004).

Consider as an example of an evolving experiment an action learning project at a major newspaper chain that focused on the problem of declining readership among young adults (reported in Raelin, 2000). The original project was commissioned to design a new format to attract readers in the critical age group of 25-43. However, the team quickly found out that their new designs met with considerable resistance from the paper's journalists, who were concerned that journalistic integrity was going to be sacrificed. Rather than try to override the journalists, the team brought them into the decision process, inviting them to disclose their concerns and preferences. The team also surveyed the paper's general readers as well as the target audience. In time, the (what became known as) "25-43 process" became the actual project – an institutional method of assessing in-house and consumer opinion when attempting to fine-tune the paper to "at risk" reader groups.

Action learning projects are rarely, if ever, dictated by an all-knowing sponsor. In fact, projects are supposed to be chosen that have no known solution and that typically require creative and novel approaches. Accordingly, there is little room for pre-specified solutions to problems. Everyone on the team is needed to contribute to the solution process. Further, the process generally requires mutual problem solving rather than other influencing modalities, such as forcing or bargaining. This is because everyone's talent is needed to invent new ways of operating that may lead to innovative outcomes (Hattori and Lapidus, 2004). Admittedly, mutual problem-solving processes take more time than other influencing strategies since each party seeks to maximize his or her needs (Thomas, 1976). Yet it can lead to richer, more comprehensive appreciation of issues among the involved stakeholders. Further, it tends to humanize the parties rather than depict them as opponents with the

attending stereotypes. It leads to empathy and goodwill that can lay the groundwork for an ongoing productive relationship.

Consider another example of a collaboration that occurred this time within a network of academic organizations. The Boston (MA) Consortium for Higher Education (TBC) has as its primary modus operandi the development of trusting relationships across its member schools so that each might engage the creativity and energy that reside within the network system as a whole. In 2001, TBC engaged the author to use an action learning framework to introduce collaborative leadership to its members. Accordingly, it introduced an Executive Development Series that would take participants through systematic stages that would require increased personal and professional risk. These stages were labeled:

- Perspectives Discussion
- Learning Team
- Project Team

In Stage One, the participants, primarily chief financial and human resources officers, were assembled to interact with a facilitator and with one another regarding alternative perspectives of leadership theory and practice. The participants decided in advance how many and which perspectives that they would like to consider. Each perspective was supported by readings that were carefully selected not only to characterize the perspective in question but also to provide alternative, even contrary, views in order to stimulate thoughtful dialogue and provoke experiments in practice.

In Stage Two, a learning team emerged from the initial stage's discussion group to entertain a new level of experience. Having digested some of the alternative theories of leadership from Stage One, participants endeavored to engage in a series of experiments in their leadership on the job. They were asked to journalize about their experiments in practice and, when the learning team next assembled, come prepared to share their experiences with their team members.

In Stage Three, the group transitioned into an even higher level of experience. Those from the prior stage who wished to continue on embarked on a team project of collaborative intercollegiate strategic change. They became a project team. This stage was based on the theory that there is no greater opportunity for real-time experience and collective reflection

on that experience than from doing work together. At Stage Three, the learning team and project team became one and the same.

While going through these stages, the participants had complete control over the agenda. What was happening was an evolutionary process of releasing control. They were encouraged to create a supportive community – a veritable practice field - that allowed them to talk freely about their fears and failures as well as their hopes and successes. They reflected together on the personal leadership experiments that they undertook in their “back-home” environments. In time, they spawned a “second-generation” of university administrators who, too, were encouraged to experiment with their leadership behavior in such a way that collaborative leadership could become contagious within their own institutions. Through these efforts a critical mass of network administrators are now attempting to not only adopt mutual leadership within their own universities but to also reach out to one another across their network to reap additional rewards from collaborating with one another.

### Compassionate Leadership

Compassionate leadership uplifts an organization since it represents a process that dignifies the human spirit to grow and achieve. Compassionate communities are characterized as endorsing a diversity of views, even those that do not conform to existing mental models and practices. In this way, compassion entails an appreciation of other cultures and a sensitivity toward views that are less privileged than those in the dominant culture.

As a grass-roots form of learning, action learning emphasizes such critical democratic values as humility and sustainability. Participants come to recognize the connection between individual problems and the social context within which they are embedded. They appreciate any social transformation because they participate in it (Wenger, 1998). By bridging their inner and outer worlds, they can speak with integrity in any effort taken to heal the ecological, economic, and social systems in which they live (Habermas, 1971).

For an action learning program to be successful as a vehicle to help transform an institutional culture to a leaderful organization, it goes a long way when public figures model integrity in their own behavior and discourse. Consider the practice of William Peace, a former executive with Westinghouse and United Technologies, who as a newly minted executive and against the advice of his closest colleagues, chose to meet alone with fifteen people who had just found out that they were given a pink slip. The encounter was an emotionally



battering experience for Peace as he had to submit to former employees pouring out their grief, anger, and bewilderment. When he got a chance, he tried his best to explain to these employees that the survival of the business required their release, even though there was absolutely nothing wrong with their performance. In the end, the business was sold but the remaining entity flourished sufficiently so that Peace was able to offer the chance for half of the dismissed employees to return. Without exception, every person offered the chance to return accepted, even those who had already found other jobs in the meantime. In retrospect, here's how Peace later depicted his so-called "soft" management approach (Peace, 2001):

Unlike the classic leaders of business legend with their towering self-confidence, their unflinching tenacity, their hard, lonely lives at the top, I try to be vulnerable to criticism. I do my best to be tentative, and I cherish my own fair share of human frailty.

As critical theorists, participants in action learning also probe to the roots of knowledge, investigating how it has been constructed and managed and how what is deemed to be relevant or even common sense has been arrived at (Alvesson and Willmott, 1996; Reynolds, 1999). They seek to examine whose interests are served by the forms of knowing in popular use, be they instructional methods, curricula, or classroom technologies. Using dialogic practice, learners are prepared to move from an instructor-identified beginning point to successive rounds of participant interaction (Freire, 1970; Giroux, 1981; Shor, 1992).

The dialogic process of action learning addresses a fundamental dilemma posed by Anthony Giddens (1991) underlying the very process of reflecting-in-action. Giddens referred to the "unification versus fragmentation" of ourselves and our being in the world. In unification, one protects one's self-identity from the seductive influences of modern society. In fragmentation, the self yields in conforming to the expectations of these outside influences.

Giddens' dilemma can be addressed by action learning, especially in view of the two endpoints. Unification may be ameliorated if participants show a willingness to confront themselves and ongoingly create alternative interpretations of their own constructed reality in the company of trusting others. They become receptive to what Alvin Gouldner (1970) once referred to as "hostile information," or data that run contrary to their comfortable stance. They submit to the critical gaze of others. As for fragmentation, action learning encourages participants to distinguish themselves from their social contexts. They learn to posit viewpoints that might not be accepted in their community. They become willing to face the

utter isolation that may come from ostracism from the group. For the most part, members in an action learning team tend to feel accepted within their community because they feel valued. They are unlikely to feel lonely or ostracized because of the compassion extended toward one another.

### **Assessment**

It is worth asking how we might know whether an action learning program - with the ingredients and stipulations advised earlier – has had the proposed effect on participants. Are they now more capable of exhibiting collaborative leadership and what do their behaviors look like? The assessment of a collaborative form of leadership in its own right would point to an altogether different taxonomy than one containing the charismatic elements associated with conventional leadership models. We would not be so much interested in how one inspires the pack, for example, as how one participates within the group and elicits others' comparable participation.

Measurement in action learning, furthermore, may require indicators not typically used in conventional training since individuals and teams create their own workplace reality through ongoing individual and public reflection. Measures may incorporate informal and incidental learning that occurs within the workplace itself rather than in the classroom. Although conventional survey and evaluation techniques can be employed, action learning may make use of narratives and dialogic approaches, such as scenarios and process maps, to capture the embedded learning through consensus-building processes (Inman and Vernon, 1997).

I propose three skill categories that emanate from action learning experience that are likely to contribute to collaborative leadership both within the self and potentially within others. They are: engaging, developing, and sharing knowledge from experience.

#### Engaging knowledge from experience

Engagement posits a condition that may have to exist within the participant even before program participation because it characterizes a readiness to learn from experience. Accordingly, engagement precedes understanding by its mere call for participants to see their own views as tentative and to be open to the views of others (Shulman, 2002). Action learning can accelerate the engagement process by helping participants to become more

critically aware of their own assumptions and defenses. They also learn to identify any inconsistencies between their espoused beliefs and their actions.

#### Developing knowledge from experience

The development stage contributes to collaborative leadership by empowering participants to use the knowledge they currently have to work with others to manage new or unknown situations. They also develop the confidence to construct new knowledge together if their command of current theory is inadequate within new contexts. They may also draw on knowledge from new sources to help them work through problem dilemmas and challenges (Mezirow, 1981; Boud, Keogh, and Walker, 1985; Billett, 2001).

#### Sharing knowledge from experience

By the sharing stage, participants in action learning programs demonstrate an ability to make contextually relevant judgments while continuing to learn about themselves in practice (Teekman, 2000; Leonard and Swap, 2004). They are able to change their course of action based on a vigorous and open exchange of views. By this point, they have begun associating learning with the very act of collaborating with others.

#### Institutional measures

In addition to an assessment at the individual and interpersonal learning levels, it is important to determine the impact of action learning on institutional collaboration. Although an individual may invite the participation of others, we would need to know whether units as a whole exhibit relationships that are mutual in character (Kirkman and Rosen, 1999). Social network theory offers a number of measures that assess the nature of relationships in a team (Freeman, 1979; Borgatti, Everett, & Freeman, 1992; Mayo, Meindl, & Pastor, 2002). Two such measures that can be used are: team density and team centralization. Team density refers to the number of relations in the team in comparison to the number of possible links. In collaborative networks we would expect the team to be relatively dense under most decision conditions, implying a high degree of interactions among participants. Team centralization refers to the extent to which particular participants are unequally central. In collaborative leadership, we would expect over the course of a series of decision episodes that the team would be relatively decentralized, in other words, that everyone would be connected to each other in the team and that no one actor would be permanently central as a

key decision node. These team measures have applications across teams and organizations, thus having the potential to estimate institutional effects.

## **Conclusion**

In this new century we seem to be on the verge of a change in the paradigm of leadership from the individual hero without whom the group would founder to the partner who nurtures everyone's contribution. We're not there yet because in our North-American culture, in particular, we seem to value, even revere, individualism though we may preach teamwork. Whatever the walk of life, be it a corporate setting, a professional sports team, or an opera, there tends to be a focus on the star performer even when he or she may be entirely dependent upon the team to achieve prominence. Further, especially during times of crisis, people like to conjure up the romantic notion of charisma to uplift their spirits. They define a social reality of leadership representing special mythical qualities endowed by only very special people. Although these qualities may not exist, they are often ascribed to the leader by either an implicit or carefully conceived orchestration by particular members of the follower community or by the leader him- or herself. Yet, the romantic view of leadership embedded in the idea of the individual hero or charismatic can unfortunately deprive a community of its own power and utility but because left unexamined, it can lead to demagogic behavior and disempowerment.

Moreover, systemic conditions may pre-ordain the emergence of more collaborative leadership models. The turbulent world characterizing organizations today, staffed by increasingly diverse and skillful people, can no longer be pulled together by bureaucratic authority. The enterprises that will flourish will see to it that every organizational member will have the necessary tools to not only run his or her immediate work function but also to see how that function connects to the rest of the organization. People will thus have access to resources that were once the exclusive domain of top management. Operating as part of self-directed teams or just as individual contributors, organizational members will engage with others – will exhibit collaborative leadership – because they have the requisite responsibility and expertise, not because they have the mantle of authority. As Bill Gore, founder of W. L. Gore, the maker of Gore-Tex, was given to say, “leadership is defined by what you do, not who you are.”

Preparing for this world of collaborative leadership will require a different form of leadership development than the platforms to which we have become accustomed. Formal management education programs in academia and corporate development initiatives are already transitioning to educational approaches that make use of actual business problems. Since organizational members are increasingly being encouraged to co-construct their own practice environments, it is reasonable that they be expected to co-construct their learning environments from the requirements of their local situation and not only from the mindset of external authorities or academic experts. Using action learning, participants learn and become competent practitioners as they work.

If action learning participants were just to keep their heads down and work individually on mundane project tasks, we would not expect their leadership to be affected. On the contrary, according to the practice espoused in this article, participants are seen as being spontaneously interactive and relying on others to help them “learn” their way out of trouble. This form of collaborative learning is enhanced by concurrent and collective reflection on experience. As an approach to learning that is bound up with the participation and activity of others, that sees practice as a process of experimentation and reflection, action learning can have a profound effect on collaborative leadership.

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