

Action Learning Process

The Action Learning Process (ALP) ran from Feb – July 2012. It was set up to help us answer the questions ‘what does campaigning with Common Cause look like, and how do we help people move to that approach?’

Our assumptions before we designed this process:

- The participants will have to create the opportunity for them to apply their learning – their own organisation is likely to be resistant.
- Building capacity (skills, knowledge, attitude, opportunity) is a successful strategy in creating change.
- We have some knowledge to share – but don’t have all the answers. Therefore this process is framed as a shared inquiry, not a training.
- NGO model is not shifting fundamentals, which we need to do if we’re working towards systemic change.

Our Theory of Change rested on three pillars. We assumed that the participants in our ALP would need these three things in order to apply campaigning with Common Cause:

1. **Strategies for change** – tools and practical skills to implement CC
2. **Personal development** – leadership, leading beyond authority within their organisation
3. **Building community** – a support network to accelerated their learning

1. We measured **strategies for change** by looking at the quality of the innovation in design and the impact of their efforts to create change:
 - Design - how did they model their change-strategies to include the designs they learned about?
 - Impact - how did they apply the models and tools that they’d learned about?
 - How did they build internal engagement into this work?
2. We measured **personal development** by looking at how they are taking leadership and the depth of self-knowledge. We helped them to be clear on their own personal values, and how to overcome challenges in learning to work and live in alignment with these.
 - Did they lead on action within their organisation?
 - Did they reveal more of themselves in the check-in and check-out?
 - How did their sense of self change in the exit interview?
3. We measured the **building of community** by looking at the quality of relationships:
 - Did they meet up/speak to one another outside the process?

- Did they ask each other for help?
- Did they do + share their homework (and on time)?
- Were they being vulnerable with one another?

What we're measuring

We used a model of developmental evaluation – tracing whether our hypothesis matched the real experience. Looking at what came up in the homework, exit interviews, check-in and check-outs and other indicators, we were able to gain a good sense of what was working for the participants and what the ideal conditions would be for future ALPers.

- Check-in and check-out at every in-person meeting
 - Great indicator of what was present for participants, and therefore was useful for us to know what to look out for.
 - Were they changing what they were saying? (ie - what were they learning?)
 - Are they revealing more of their self? (were they building group trust and intimacy?)
- Exit interview
 - What impact did this process have on them?
 - What would they liked to have seen more of?
- Homework
 - What did they learn?
 - Did they fulfill their commitment to the group?
- Impact internally
 - Were they implementing CC at work?
 - Did they ask for help with session plans and workshops?
- Other Indicators
 - Did they show up?
 - Did they bring things that indicated commitment to the group?
 - Did they tidy the room/after themselves?
 - Did their attitudes change?

Framework for M&E

We used a framework from [Shirlaws Business Coaching](#) for our evaluation that Charlotte successfully used in the UnLtd Future programme.

For each element: the participants, the programme and our own collaboration, we asked four questions.

- What worked?
- What didn't work?
- What were our expectations?

- What did I learn?

The Participants

What worked?

- We created a really strong sense of **community of campaigners**, particularly in the relatively short space of time. Even the ALPers who were least able to implement CC and those who had to miss more than one session expressed how much they felt part of a community.
- **Having a buddy** – two participants from each organisation was absolutely key to the success of implementation. For those who already had a friendship, it grew significantly. Having three or more from one organisation in future ALPs should work, though attention should be given to how to maintain some of the buddy-system intimacy.
- The process worked for the campaigners who had **agency** within their organisation, either through seniority, or because they were trusted and had access to other power levers internally, or because the organisational culture encouraged innovation.
- Having a **range of organisations** – both in terms of issue they work on and their size. Helped participants to see how it could be applied elsewhere. Underneath the diversity, participants could see the connections and common issues that united them. Having other sectors involved also gave more credibility to their internal advocacy.
- **Hosting at the organisations** – having participants host events in their own space was a really nice way to build community. It helped them understand the context of their fellow participants. Especially having the smaller organisations host demonstrated what a community-office vibe could be like.
- **Passion for their work** – being willing to do something risky/weird because they know it will help them be better campaigners. The heart they put into the work translated into their ability to be vulnerable, and to open themselves for healing. This became their leadership capacity – the inner resources they needed to lead change in their work. Through their heart, they became more of themselves.

What could have been better?

- **Those with specific projects** in which to implement CC had the best success. Gave them clarity of where to innovate.

- **Attending retreat** – was a real moment for the whole group. Those who missed some or all suffered later on. Need to be clearer at the start that this is mandatory and to reserve dates free.
- **Attitude matters.** Some participants had the sense that change was impossible (perhaps correctly!) in their organisation.
- **More peer-to-peer work** – demonstrating how they can help each other, so that at the end of the process there is more likelihood for mutual support. Frame the homework as an opportunity for them to practice working together without us. Be more explicit with what practices and methodologies to use (pro-action café etc).
- **M&E tracking deeper change** – Some really interesting conversations on worldview emerged only in the last session. Because a lot of the impact was at a deep level, there is a need for M&E to track that level of growth and learning, perhaps by asking participants to share their assumptive base before they start.
- **Networks of support** – there was very mixed results in their finding allies and mentors. This was perhaps because they didn't feel confident about the ALP content to ask people to help them, or because Casper didn't support them enough in this process. See later notes on need for prescribed mentors to remedy this.

What were our expectations?

- **Theory of Change** – strategies for change + leadership development + community of learning – turned out to be pretty much correct!
- **Theory not enough** – Using the information from the first workshop would not translate into action. They would need skills and methodologies to help them implement CC/FF.
- **Resistant to change/different culture of work** – We expected more resistance to being open and emotional.
- **Implementation would come sooner** – expected that there would be more implementation as of April session, but this was spread out among the participants. Most only started to apply from May onwards, though some started in March and others only in June or not at all.
- **Home groups would provide participants intimacy** – didn't happen much perhaps because the large group together already had a lot of intimacy.

What did we learn?

- They need **coaching** one to one on implementation, need specific help. Should have had this from the beginning from a mentor who understand the process. This would break the dynamic of 'I don't know what I'm doing'.
- Participants need to **learn how to reflect/learn**. Again, need for mentors here to take them through reflective learning.
- **Homework** needs to be done differently.
- So important to be in **residential home space**, really personal connection. Nice to host in home offices – gave people the chance to be the host.
- We could've gone deeper with the **spiritual work**. This was one of the highlights for many of them.
- Big **gap between their expectations** of programme and reality. They entered for intrinsic reasons (some of them) but got completely different outcomes.
- **Intimacy between buddies** can really grow, especially when they're friends before.

The Programme

A brief note: there are some real contradictions in programme feedback – some loved certain sessions that others weren't fans of, and visa versa, so this is our aggregate assessment added to our own views.

What worked?

- **Opening circle** for first session set the tone. Spending 1.5 hours on why they were there was a great way of demonstrating how we'd work together. It gave us confidence that this is going to work, and shook the group out of the normal modus operandi.
- **First session focus on theory** – participants loved this. Great introduction, gave them sense of excitement and authority. Wanted more of this.
- **Intimacy** – telling own story, asking questions in World Café like 'what time is it for you, your work and the world?' Always bringing the personal in.
- **Weekend in Forest Row** – really worked as a shared experience. Bringing Simone in to help design and host so that everything ran smoothly. The range of methodologies - world café, learning journeys,

solo time, storytelling, witness triads, people cooking and eating together, people crying and laughing together. Created a very strong bond. Just about every M&E call at the end highlighted the days away together as a significant 'shift-moment' in the process.

- **Storytelling session** – Ashley was masterful and playful, responding to the needs of the group rather than coming in with very set standard workshop. The storytelling work also followed on nicely from the organising/story of self session before. Focus on practical skill.
- **Closing session** – being very conscious about the closing worked well. Celebrating and bringing in the rest of the CC community helped to hand over relationships.
- **Timing** – monthly meetings and retreat at the beginning worked well.
- **Inner and outer work** – and sharing the process that Casper and Charlotte were in created a real depth within the ALP.
- The **invitation was powerful** – because the caller was part of the community. If the invitation were a blanket and impersonal one, then it wouldn't have worked in the same way.
- **Using singing and the creative arts.** More of this in the future! Helped build a sense of community – knowing the same songs etc.
- Building the process on the idea of engaging **head, heart and hands**. Although the speed at which we progressed and the balance between the three wasn't perfect, this model of learning was successful.
- **Rhythm to the sessions** – always opened with check-in, always closed with Hopes, Fears and Proud. Gave sense of community ritual.
- **Mentors made real difference.** Two participants with formal mentor support (who were part of the CC network) saw the biggest advance in their confidence of applying it and having organisational support. Big factor!

What could have been better?

- **Balancing content and application** – spend time on the concept in the morning, and then focus on application in the afternoon. Speakers come in the afternoon to talk about their experience of applying what we're learned in the morning. We frame it in (why is it important – how does narrative relate to values etc), then speaker leads workshop exploring 'this is how I do it'. Often we only did one – just practical implementation or just the conceptual thinking. We didn't always introduce the concept of the tools and how it relates to CC, particularly then linking that to their homework.

- Participants and funders not clear on the **value of the process in monetary terms**. Worth costing out fully and making this explicit. Lifts expectations and responsibility for participants. All external people gave us rates mates.
- **Power and privilege session** – a different frame of seeing the world to Common Cause, facilitators not practiced working together and were not open to collaborating with us. When asking people to co-host – it requires real mastery in the co-host for us to have trust in them OR a lot of orientation and getting on same page.
- **Theory/models at organising session** – felt too much too soon. Didn't have context, so needed more framing and more time to explore the theory surrounding the teaching component. Two loops model, Theory U etc.
- **More examples** – relates to the need of practitioners to share their story. Bring in more case studies.
- **Coaching** – working through questions of concept and strategy, not how to use a particular tool. 'How do I bring together the whole organisation in a participative process?' etc.
- Do an **Art of Hosting training** – would benefit everyone. Although they picked up a lot by being part of well-designed process, learning how to think through for themselves would really help them organise conversations internally. If ALP was a longer process, they could end up co-hosting days to practice.
- Use CC in practice to **design a campaign together**. Would give them confidence and an example to talk about when advocating CC.
- **Homework** didn't reveal their depth of thinking and conversation. Their reflection skills are poor, so need to spend time on 'what is reflection' and taking them through some models for reflection. In this homework, they've been telling us 'what', not 'so what'. Participants were also not clear on what the homework was achieving – caller needs to be clear about what the homework is *for*.
- Facebook group was good for sharing interesting links, but not everyone was on Facebook. **Specific wiki space** for useful resources might have helped them document the interventions that were being made and added to their sense of responsibility by being able to track progress. There was a definite need for milestones for them to know how they're progressing.

What were our expectations?

- **Expected the links between programmatic content and values to be clearer to people.**
- Assumed that these people would have **grounding in this approach** and analysis already – through some previous training, reading or experience.
- **More self-responsibility.** We expected very good participation. Casper didn't pressure them to bring what they're doing with CC in practice to the group – should have been more of this, particularly through homework.

What did we learn?

- We can design a **brilliant programme** with high impact.
- Modeling **vulnerability in leadership** and learning how much/what kind to add in process like this. Where to bring in our experiences to illustrate wider points.
- **Expertise costs money** and that wasn't clear at design-phase.
- **Closing is time for community to say goodbye** to each other, not to show off.

The Collaboration and me

What worked?

- **Faculty/wider community** were really welcomed in a way that created fluency and seamless integration between sessions. Everyone slotted in very well. There was a good balance between holding structure and being open to contributors (except P&P workshop).
- **Being in our own enquiries** created a depth to the process. Symmetry and authentic alignment between hosting teams journey and participants.
- **Recruitment** – working through relationships ensured high-quality of participants. Invitation was personal and warm, and was taken in that spirit.
- **A mixture of think, feel and know.** Casper was the emotional heartbeat of the group (feel), Charlotte the guide (know) and Ali the rigour in learning (think). Good balance.

What could have been better?

- **Power & Privilege workshop** – they needed time to get to know the group to work with them. In future, need for introducing the external people skillfully. Our planning meeting together was fraught and too

short. Emails revealed a lack of trust. If there'd only been one external person, it might have been less of an issue – but there were two, so it felt like us stepping into their culture, not them into ours.

- **Need clearer agreements earlier on** – what can money be spent on, how much time will this take from conveners, is there agreement on the ToC?

What were our expectations?

- **The depth of what we're dealing with is directly correlated to how safe it is for us to go deep.** For example, spirituality and creativity.
- Having a **caller who is part of the community combined with an external person** (ie – campaigner with non-campaigner) worked well. Gave perspective and intimacy. Balance of inside and outside knowledge and skills.

What did we learn?

- **Don't do this on your own.** Three people is a good-sized team, you need at least two people to hold space.
- You are not a community until you've **sung, danced and told stories together!**

Future ALPs – Advice For Next Time

Two Stage Process

The ALP could now be split in two halves – a bachelor and a master programme. The undergraduate programme wakes people up to the role of values, introduces them to some introspective work, and starts to work with them through participative methods etc. Not everyone graduates from this programme to the next one – they need to demonstrate readiness for what comes next.

The graduate programme is for those who are aware and conversant in their own values, who understand the content and who are frontrunners. We would then support these in their implementation – prototyping, designing workshops and change strategies in depth. The master programme would include some sort of process to change organisational culture – effective domain: grief, change, letting go. This process could be specifically for senior leadership. They spend time working on an appreciative inquiry process within their organisation exploring barriers to change.

Selection Criteria

- They need to have **agency** in their organisation (either through seniority, culture of openness, or their own pulling power).
- They need to have the right **attitude**. They have to think change is possible in their organisation, and not see this as an opportunity to rail against the system.
- They need to have **time** to implement CC. This means that in addition to the time spent in workshops, there needs to be the expectation that they will spend some time with a mentor and trying out new things at work.
- They need to have some **self-awareness** – know their values, how they're perceived, what self-development they want to do. Get them to identify the potential barriers they might encounter in creating change.

Who Could Run It

Needs at least two people.

- One with process design experience
- One who is a caller from that community
- One who has experience and rigour in monitoring and evaluating the process
- Both need to have a strong relationship together with an open culture of growth because this sets the tone for everyone else in the process.
- A leader as host, not a leader as hero
(http://berkana.org/berkana_articles/leadership-in-the-age-of-complexity/3/)

Mentors

Good mentors were absolutely key for the attitude of the participants (shifting from 'I'm not sure what I'm doing' to 'I can an am implementing CC') and for their impact. Mentors brought in a reflective learning, which led them both to write extensively about their learning and CC in their work.

What we'd hope to achieve through a peer-to-peer 'home group' was much better achieved through having formal mentors associated with the CC network. For future ALPs, I'd strong recommend assigning each participant a mentor.

Recruitment

Spend time doing recruitment, get to know the potential participants – it pays off.

Reflective Learning

The idea of homework is a good one – it keeps participants engaged and committed between sessions. However, the frame needs to shift to one of

reflective learning – which they may need to learn about before doing it. Have participants keep a journal and review together in workshops so the connection between sessions and individual learning is clear and progress is rewarded.