

# *Facilitating action learning & virtual action learning for leadership development: experiences and insights from a UK Masters programme*

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# Facilitating action learning & virtual action learning for leadership development: experiences and insights from a UK Masters programme

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# Facilitating action learning & virtual action learning for leadership development: experiences and insights from a UK Masters programme

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## ABSTRACT

Action learning is one of the most effective leadership development interventions [Day, Fleenor, Atwater, Sturm, and McKee. 2014. "Advances in Leader and Leadership Development: A Review of 25 Years of Research and Theory." *The Leadership Quarterly* 25 (1): 63–82; Pauleen. 2003. "Leadership in a Global Virtual Team: An Action Learning Approach." *Leadership & Organization Development Journal* 2003; Stewart. 2010. "Action Learning and Virtual Action Learning for Leadership Development." *Developing Leaders* (1)], yet Virtual Action learning (VAL) has always struggled to be seen as a viable alternative, with both facilitators and participants often preferring face-to-face set meetings, and dismissing the technological options [Dickenson, Burgoyne, and Pedler. 2010. "Virtual Action Learning: Practices and Challenges." *Action Learning Journal: Research & Practice* 7 (1): 59–72; Stewart. 2009. "Evaluation of an Action Learning Programme for Leadership Development of SME Leaders in the UK." *Action Learning: Research and Practice* 6 (2): 131–148]. However, the onset of the Covid pandemic saw the rapid implementation of this remote technology-enabled approach, where VAL became the only option for action learning due to the restrictions on face-to-face working and travel limitations. This paper shares insights on the differences facilitating action learning and virtual action learning from a research project, based around a two-year Masters in Leadership programme in a UK business school, now delivered to over 300 experienced senior leaders, predominantly working in the UK NHS and a major UK retailer.

## ARTICLE HISTORY

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## Introduction

Action learning has long been recognised as one of the ways to address complex challenges in the diverse contexts of leadership (Boshyk and Dilworth 2010; Park et al. 2013; Pedler 2008). Grint (2008) describes these challenges as 'wicked problems', more suited to 'questioning insight' (Revans 1998; Willis 2004). The global pandemic was an excellent example of a wicked problem, with no right answer, and leaders searching

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for the ‘least worst’ option. The participants in this study, had selected the programme to help them address their leadership challenges, as their organisations were facing significant issues, before and during the pandemic. Leadership development was identified as essential to address these, and action learning was seen as a very positive approach to help the participants with their ‘wicked problems’. For example, the impact on digital transformation in the retail sector saw online changes, originally anticipated to take five years, being implemented in one year, during the pandemic.

The use of action-based leadership development has rapidly increased (Scott 2017), and Marquardt (2007) reports that it is used in 73% of US corporations. According to Lombardo & Eichinger (1996), 90% of learning takes place in the workplace, and action learning offers practical benefits (Knowles 2020 Stewart 2009;), such as developing leaders’ problem-solving skills, the ability to reflect and identify actions, and work collaboratively to implement change. This study provided the opportunity to identify several research themes, such as the differences between developing leaders as individuals rather than developing leadership in the organisation (Day et al. 2014), however the focus of this paper is on the facilitators’ experiences of facilitating face-to-face action learning, and then virtual action learning, in the context of developing individual leaders’ capabilities. The research questions are:

1. What are the differences between facilitating face-to-face action learning (F2F AL) and virtual action learning (VAL)?
2. How might facilitators prepare experienced leaders for virtual action learning?
3. What are the benefits to participants, if any, of virtual action learning on a leadership development programme?

There are many different approaches to action learning and this study used the ‘classical action learning’ approach, as proposed by Revans (1998), sometimes referred to as ‘Revans Action Learning’, supported by set advisors / facilitators.

## Context

### *Action learning (F2F AL)*

Since Revans first used the term action learning in the early 1940s, he did not provide an explicit definition of action learning, but stated what it was not: that it was not a project, case study, group task, counselling (Pedler, Burgoyne, and Brook 2005). This has led to a variety of approaches. Cho and Egan (2023) described 65 different varieties of action learning, with 2 dominant streams, one US-based more concerned with teaching and the other UK-based, more focused on individuals’ development and taking action in the workplace. For example, there is business-driven action learning (Boshyk and Dilworth 2010), Critical Action Learning (Vince 2004), work-based learning (Raelin, 2008) and project action learning (Marquardt 2007). Willis (2004) produced a comprehensive paper on the gold standard of action learning identifying the essential aspects of Revans ‘classical’ action learning, as looking at practical problems in their work setting, and stating that people learnt best when supported by a group of peers. In view of the many different interpretations of action learning, Willis’ paper provided a clear, explicit

summary of the defining characteristics of Revans 'classical' action learning, which was essential to avoid confusion with other variations. This project required a consistent approach to action learning, and so the gold standard was a very useful starting point for the facilitators.

### *Virtual action learning (VAL)*

There has been research into virtual action learning for over 10 years (Aspinwall, Pedler, and Radcliff 2018; Byrd 2019; Dickenson, Burgoyne, and Pedler 2010; Hauser, 2010; Keating 2022; Stewart and Alexander 2006) as well as interesting work on virtual teams (Abarca, Palos-Sanchez, and Rus-Arias 2020; and Pauleen 2003). Abarca provides a thorough systematic literature review and bibliometric analysis on virtual teams, emphasising the increasing relevance of leadership, whilst Pauleen discusses an action learning based case study.

Byrd (2019) with reference to earlier work of Dickenson and Aspinwall, suggests that VAL can be applied with the dialogic interrelation of path-goal leadership theory to develop virtual skills in remote training consultants. Byrd stated there is limited research on VAL and identified the challenges for facilitators working without body language and physical cues. Byrd indicated that learning journals are an essential requirement for reflections in action learning. Whilst these can be helpful, they are not usually mandatory.

Cho and Egan's (2023) review of action learning in the context of action-oriented approaches to HRD and organisational impact stated that action learning has been researched widely and consistently over several decades. They identified 5 themes: action learning in higher education, action learning research, entrepreneurial action learning, critical action learning, and virtual action learning. It is interesting to see VAL being treated as a theme on its own, rather than a different means of delivery of action learning. Similarly, action learning in HE is considered as a separate theme.

Hauser (2010) described a study of virtual action learning at university and similar to Stewart and Alexander (2006) who researched action learning and VAL with SME leaders, identified benefits of virtual action learning to participants. However, both of these studies concurred on the advantages of meeting face-to-face for the first set meetings, with the option to work remotely with VAL, but then revert back to F2F later in the programme. This blended approach is often stated as the preferred position of those given the option of VAL. Stewart's (2009) study presents an evaluation of 3 blended action learning programmes, starting F2F AL then using varying amounts of VAL, with a final F2F AL at the end of the programme.

Caulat (2022a) presented a different approach, using voice only technology (telephone) for VAL. She argued that by removing visual distractions, she gains deeper levels of participation and reflection. Her approach does not use 'hands-up' or any ways of identifying who wants to speak next and she reported being able to identify the speakers. She also kept the microphones open all the time. Caulat (2022b) states that VAL, and virtual collaboration generally, is a different paradigm of interaction with its own idiosyncrasies and is therefore different in many ways from what we have learnt from face-to-face experience. Five main lessons emerge for facilitators of VAL including the effects of using cameras and different channels of communication on power dynamics and the importance of voice and silence in the virtual space.

Others (Stewart 2010; Dickenson and Stewart 2011; and Dickenson, Burgoyne, and Pedler 2010) report that technical problems have caused them to use voice only (teleconferencing) in earlier studies. For example, people in banks were unable to access collaborative software due to firewall security and resorted to using simple conference calls to conduct action learning. Whilst this was seen as useful and saved people time and cost of travelling to their action learning sets, it was referred to as a 'lesser' experience.

As one facilitator observed:

'The conference call was OK, but you couldn't see the other people, so it was impossible to read non-verbal communications, such as frowning, smiling, nodding, etc'.

Pauleen (2003) explored the early approaches to leading virtual teams and presents an action learning-based case study from New Zealand investigating how virtual team leaders coped with a number of issues associated with the completion of a critical organisational task in a virtual environment. His paper identified the need to build the relationships at the start of the virtual interaction and he proposes a three-stage process: assessing conditions, targeting the level of relationships and creating strategies. McGrath's (2000) 'Time Interaction Performance' models, also emphasised the importance of group support and well-being. This particularly resonates with some of the challenges reported in the earlier studies, often manifested as issues of trust, where these people had little or no knowledge of the leader, facilitator or group members.

Pedler, Hauser, and Caulat (2014) bring together their reflections on their shared experiences of virtual action learning, agreeing on contracting and ensuring confidentiality, but there are differences, such as starting with F2F before VAL, similar to other blended learning approaches. It was interesting to see the benefits of setting up the facilitators' sets, and techniques to encourage self-facilitation of VAL.

Dickenson, Burgoyne, and Pedler's (2010) comprehensive paper on VAL provided a 6-classification tool, where category 5 is the synchronised visual format that was primarily used in this study, with occasional use of Category 3(audio only). She identified the importance of facilitation in VAL, emphasising that whilst this is relevant to most action learning sets, the challenges of working remotely with technology imply a greater need for effective and capable facilitation in VAL.

Curtin (2016) described an account of practice with a VAL programme of learners on an 18-month extension to a one-week leadership programme at the Business School, similar to the study in Aspinwall, Pedler, and Radcliff (2018). It considers the following issues: the structuring of a virtual event; the significance of maintaining continuity of learning; the need for commonality of reference points about leadership; the selection of problems by participants; whether leadership development itself is a 'wicked problem' and the role and skills required of the 'tutor'. Amongst other advantages, the participants found the chance to build relationships with other participants broke down the loneliness of leadership and greatly enhanced their learning, supporting Revans 'comrades in adversity'. This example illustrates the more teacher-led approach in US as students' 'tutor' instructed them on the use of VAL. However, the evaluation indicated that most students thought applying leadership concepts using action learning was better, with more students evaluating VAL positively than negatively.

Summarising the research into action learning with leadership programmes, there was some interesting work, however there was a limited number of VAL studies, especially

VAL-only, rather than the blended studies, which included a combination of both F2F AL and VAL. The emphasis on the importance of relationship building, especially with virtual teams, is increasingly identified. However, there is a consistent theme that technology was a hindrance in earlier studies.

### **Facilitation**

There has been much discussion over the past years about the role of providing an additional person to support the set, often called the facilitator or set advisor. Revans himself described the role of accoucheur (midwife), yet also questioned the role of the facilitator as an unnecessary addition to the action learning process (Pedler and Abbott 2013). Pedler and Abbott (2013) described three facilitation roles for action learning: accoucheur, set advisor and organisational/professional developer. The accoucheur is focused on the initiation of the set, the set advisor works with the set in their meetings, and the organisational developer is concerned with broader organisational learning. It is interesting to see the separation of the roles accoucheur and set advisor, as many of the above studies have combined these roles into the single 'facilitator', covering both sets of activities. In the different varieties of action learning (Cho and Egan 2023), the facilitation role is very varied: from the active instructional 'tutor' to a more passive role, only intervening to guide the process. This is further complicated by the loose definition of facilitation – in dictionary (OED) terms it simply means 'to make things easier' so this is also open to multiple interpretations. Stewart (2006a) reviewed many definitions of facilitation, specifically the work of Schwarz (2002) derived from work with Argyris (1971) which identified different facilitator roles depending on the neutrality of the role in relation to process and content, where content refers to the actual knowledge component (P – programmed knowledge in Revans' terminology), and process as the facilitation process. The 5 types identified are:

1. Independent facilitator
2. Facilitative Trainer
3. Facilitative Consultant
4. Facilitative Leader
5. Facilitative Coach

In classical action learning, the facilitator's role is towards the content-neutral definition of an independent facilitator, where they do not provide answers to specific questions, but ensure the integrity of the action learning process. Schwarz also introduced the terminology of 'basic' and 'developmental' facilitation, where the developmental facilitator worked with the group for longer periods of time on more complex and often personal issues, in a similar way to the organisational developer role, described in Pedler and Abbott (2013, 98). They also emphasise the importance of relating this to classical action learning, where facilitators should be knowledgeable of the action learning process and with an interest in helping the set to solve their problems, so not teaching, nor directing. Although other studies such as Curtin (2016) referred to the facilitator more as an instructor, so a 'Facilitative Trainer' in Schwarz's terminology.

In summary, whilst there is some research into facilitating action learning in leadership programmes, there is a limited number of studies using VAL-only, rather than as part of blended approaches, with a combination of both F2F AL and VAL. The importance of the facilitator role is repeatedly identified, with suggestions that this is more important in VAL, and indications that this may be different, when there are fewer or no physical cues. There is a clear emphasis on the importance of building relationships when working with virtual teams (Caulat 2022a). However, the theme that technology was a hindrance in earlier studies has emerged, and it is the advent of new technology such as Zoom, MS-Teams etc. in the late 2010s, that was a significant factor in enabling effective VAL.

## Methodology

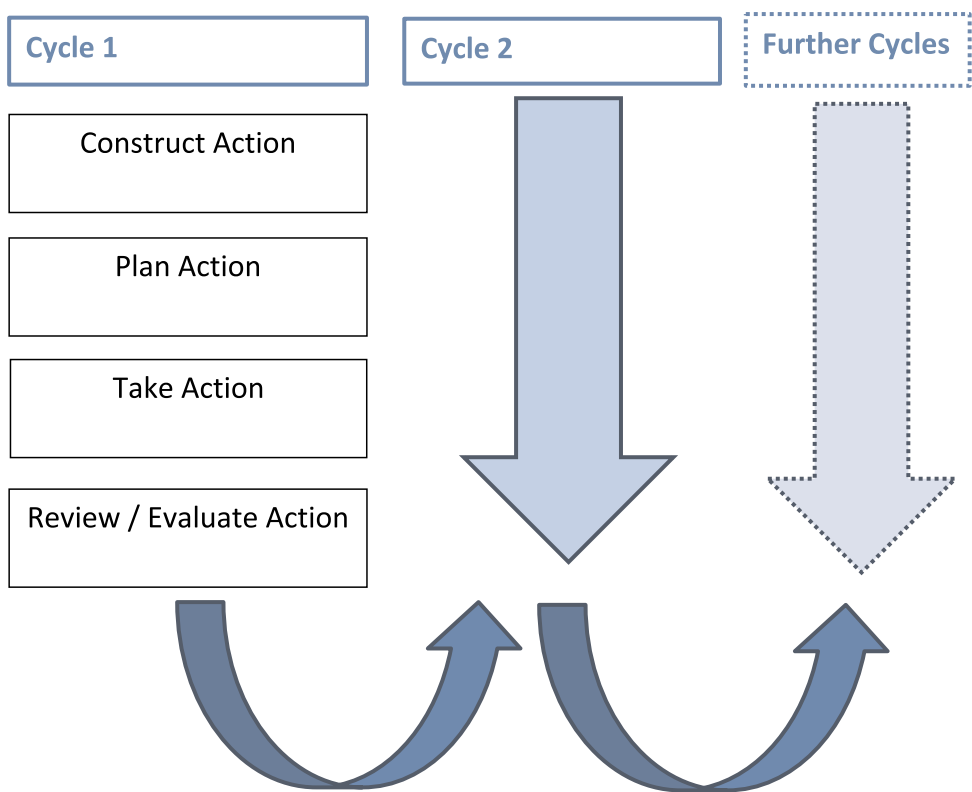
### Context

When the programme initially launched in 2015, it was considered as a pilot study providing the opportunity to research the effectiveness of the earlier study (Stewart, Simister, and Thurloway 2014) that had guided the design of the programme, with action learning included at each F2F workshop over the 2-year programme. Initially it was anticipated to start a programme each year, so slowly building up the data and deriving insights from each cycle. Therefore, the action research methodology (Coghlan and Brannick 2014) was chosen to be most appropriate to address this exploratory topic, with the researchers primarily being the action learning facilitators. It was intended that each cycle of action research, as shown on Figure 1, would inform the next cycle. The original research study was focused on the broad question of *'how this programme might effectively develop leaders'*.

However, following the start of the first 2 cohorts of the programme, two important external factors changed the original intention of this study. Firstly, the programme was accredited as the new CMI Level 7 SLMDA apprenticeship standard, which suddenly opened up the market, rapidly increasing the number of programmes (see Table 1), from one cohort per year, to starting 10 cohorts in the years 2019 and 2020. This included 6 closed cohorts delivered to NHS Trusts, 2 cohorts to a leading retailer, as well as 2 open cohorts, each including approximately 30 people.

**Table 1.** Cohort summary.

| Cohort        | Start    | Scheduled end | Attendees (start) | AL set meetings | VAL set meetings |
|---------------|----------|---------------|-------------------|-----------------|------------------|
| F2F AL only   |          |               |                   |                 |                  |
| MA1           | Jun 2016 | Jul 2018      | 15                | 8               | 0                |
| MA2           | Jun 2017 | Jul 2019      | 12                | 8               | 0                |
| MA3           | Oct 2018 | Jul 2020      | 12                | 8               | 0                |
| F2F AL to VAL |          |               |                   |                 |                  |
| NHS1          | Mar 2019 | Sep 2021      | 20                | 4               | 3                |
| MA4           | Oct 2019 | Jul 2021      | 35                | 5               | 2                |
| RET1          | Nov 2019 | Jul 2021      | 32                | 3               | 4                |
| RET2          | Feb 2020 | Apr 2022      | 30                | 1               | 6                |
| VAL only      |          |               |                   |                 |                  |
| MA5           | Oct 2020 | Jul 2022      | 34                | 0               | 6                |
| NHS2          | Nov 2020 | Jul 2022      | 28                | 0               | 6                |
| NHS3          | Nov 2020 | Jul 2022      | 30                | 0               | 6                |
| NHS4          | Nov 2020 | Jul 2022      | 32                | 0               | 6                |
| NHS5          | Dec 2020 | Jul 2022      | 24                | 0               | 6                |
| <i>Total</i>  |          |               | 304               | 37              | 45               |



**Figure 1.** Action research diagram.

Secondly the COVID pandemic impacted all programmes from April 2020 onwards, with the move to totally online delivery. This provided the opportunity to revisit earlier research into VAL and now allowed the analysis of the differences between facilitating F2F AL and VAL. This had not been possible in earlier cohorts, but VAL was now an essential part of the programme delivery. The research team had not previously had the option to set up such research in the business school, delivering the same programme but with different modes of action learning.

Table 1 illustrates how the cohorts were initially scheduled, however the end dates were changed in April 2020 and then again in November 2020, when the revised dates were still not achievable, particularly for NHS cohorts, who were working under extreme pressure. There were also many cases of individuals being granted extensions and there is still a small group of 18 ‘returners’ completing a special variation of the programme. In addition to the MA degree requirements, there were additional submissions required for the apprenticeship, with an external assessment taking place about 4 months after the completion of the masters, where they received CMI Chartered Manager awards.

Therefore, whilst the original aim of the study had been a longitudinal study evaluating F2F action learning and leadership development, this unexpected change caused the direction of the study to now consider the differences between facilitating F2F AL and VAL.

The revised research questions were:

1. What are the differences between facilitating face-to-face action learning and virtual action learning?
2. How might facilitators prepare experienced leaders for virtual action learning?
3. What are the benefits, if any, of virtual action learning on a leadership development programme?

The research methodology continued as qualitative, exploratory action research, analysing the emerging data from interviews and focus groups with the programme director and facilitators. Data was collected from the facilitators individually by telephone interviews after the set meetings, and then from the larger review meetings (focus groups), with the facilitators, in written notes. As with most exploratory research (Bryman and Bell 2015), the researchers were open to other observations and discussed these in the reviews, as shown in Table 2.

The initial action learning sets started face to face and the facilitators noted any issues they came across and followed up with the programme director. There were also short observations by the programme director at the first set meetings, as sets were running concurrently. Reflection took place at three levels: firstly, the reflection with the set members at the end of each set meeting, then the facilitators' reflection with the programme director, then the reflection with the other action learning facilitators. This was formally done every few months, although many shared informally with their colleagues.

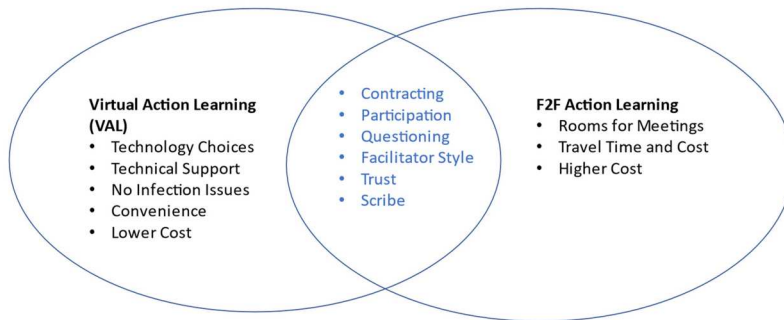
This formed a set pattern for the face-to-face action learning; however, the move to virtual action learning, led to more frequent reviews. For example, after the first virtual set meeting, the programme director and facilitators met within days to reflect and review their learning and experiences. Each iteration of action research led to some small changes in the delivery of the F2F action learning, with major changes implemented at the start of VAL.

So, whilst the methodology was originally intended as a longitudinal study following the action research approach, as shown in Figure 1, exploring leadership development through classical action learning, the impact of both the apprenticeship accreditation and the pandemic provided the opportunity to change direction and focus on the differences facilitating VAL. However, the action research methodology was still appropriate, with this change being considered as a significant part of the review and evaluation at the end of cycle and changing the direction for the next iteration of research (Figure 2).

**Table 2.** Summary of reviews and data collection.

| Reviews        | Set Reviews                                                                                                                                                         | Peer Reviews                                                                                                                                                                    | Annual Review                                                                                                                                                                                |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                | Each AL set concluded with a review of the AL process with the set members. Exceptional situations were reviewed with programme director immediately after the set. | Initially about 6-month frequency, with reviews by each facilitator presented at half day workshops, sharing and learning from each other. More frequently at the start of VAL. | Reflections from Programme Director following observations of some AL sets, with aim to align process across sets and facilitators. As more facilitators joined, these became masterclasses. |
| Data collected | Facilitator comments Set member examples                                                                                                                            | Facilitators data and reported set member data                                                                                                                                  | Programme Director and facilitators data                                                                                                                                                     |

## Virtual Action Learning and Action Learning – summary of differences



**Figure 2.** Summary of differences.

### Findings

The following diagram summarises the 3 different facilitation experiences; F2F AL only, combination F2F AL then VAL, and VAL only, showing where there are explicit differences such as VAL only looking at technical choices, and F2F AL only requiring rooms to be booked and additional travel expenses, so incurring additional financial costs. The overlapping area indicates aspects covered by both VAL and F2F AL but with a different emphasis.

#### *F2F AL only*

This study started in 2016, with 15 senior leaders on the MA Leadership programme, part of the post-experience postgraduate portfolio, which was marketed to leaders and senior managers. These early, open cohorts included a diverse mix of people from large consultancies, global companies, education providers, third sector and charities, and action learning sets were created with 6–8 people. Following the apprenticeship accreditation in 2019, additional closed cohorts started, from NHS and a large UK retailer (see [Table 1](#)). These included people from different parts of the organisation, so it was still possible to create diversity, such as NHS sets consisting of doctors, matrons, pharmacists, senior administrators and department managers. Action learning sets met face-to-face every 1–2 months, each with experienced action learning facilitators. [Table 3](#) shows a sample programme structure indicating how action learning was included.

At the start of the study, there were just 3 experienced facilitators. However, in anticipation of the growth of the programme, further facilitators were selected, using the criteria for high-performing facilitators (Stewart 2006) and their prior experience with action learning and the business school. Several had achieved the postgraduate certificate in facilitation, so were known to the programme team. Once identified, there was a training day to ensure a consistent approach to facilitating action learning, initially just for face-to-face, with further training later for VAL. This included the action learning

**Table 3.** Example structure of the programme.

| Month    | Workshop Topics & Days                                                                                         | AL Sets                 |
|----------|----------------------------------------------------------------------------------------------------------------|-------------------------|
| Stage 1  |                                                                                                                |                         |
| Month 1  | <b>2 days – Leadership Concepts 1 day – Introduction to AL</b>                                                 | <b>6 h</b>              |
| Month 2  | <b>1 day – Leadership Concepts cont. 1 day – Leadership Development, including Coaching 1 day – Elective 1</b> | <b>4 h</b>              |
| Month 5  | <b>1 day – Elective 1 cont. 1 day – Learning Reflections Presentations</b>                                     | <b>4 h</b>              |
| Stage 2  |                                                                                                                |                         |
| Month 8  | <b>2 days – Responsible Leadership 1 day – Practice-based project</b>                                          | <b>4 h*</b>             |
| *        |                                                                                                                |                         |
| Month 10 | <b>1 day – Responsible Leadership cont. 1 day – Practice-based project cont. 1 day – Elective 2</b>            | <b>4 h</b>              |
| Month 14 | <b>1 day – Practice-based project cont. 1 day – Elective 2 cont.</b>                                           | <b>4 h</b>              |
| Stage 3  |                                                                                                                |                         |
| Month 16 | <b>1 day – Intro to Research 1 day – Developing leadership in others</b>                                       | <b>4 h (not on VAL)</b> |
| Month 18 | <b>2 days – Research methods 1 day – Developing leadership in others cont.</b>                                 | <b>4 h (not on VAL)</b> |
| Month 23 | <b>1 day – Mini-conference presenting their dissertations</b>                                                  |                         |
| Month 24 | <b>Final submissions</b>                                                                                       |                         |

\*On some programmes, this workshop followed directly from last one in stage so 1 less set meeting.

\*\*The structure of the remote delivery of dissertation workshops and size of groups meant VAL not always possible.

introduction presented to the participants, covering the history of action learning (Revens 1998, Boshyk and Dilworth, 2010) with a practical focus of questioning, using Schein's (2013) process consultation and humble inquiry. This was intended to affirm the concept of leaders asking questions, rather than providing answers. The facilitators followed their training with further reviews to maintain consistency and share experiences, in effect setting up a community of practice of 12 facilitators.

## F2F AL to VAL

In March 2020, the implications of the Covid pandemic were becoming apparent and pressures in the NHS and the retail sector led to the cancellation of all face-to-face sessions. The clients wished to continue the programme and agreed a move to remote delivery through the virtual learning environment, with virtual action learning. For the first programmes, delivery had been blended, with key content and action learning included as part of face-to-face workshops, and the virtual learning environment used as an additional supporting resource. In the summer of 2020, the faculty team, undertook a significant development project to enhance the online resources moving it to Canvas (a web-based Learning Management System), the preferred form of delivery of workshops at the business school.

The programme director and facilitators explored different technical options for virtual action learning, by setting up meetings in Canvas, Zoom and MS Teams. After various technical challenges, they agreed that MS Teams would be the best approach, as it gave the better option for using cameras without losing connections. At this time, both facilitators and participants, struggled with poor home connections and learning to use new software. There was also great anxiety about the pandemic, and the NHS staff often become infected, with many admitted to Covid wards. However, most programmes restarted by autumn 2020, with virtual action learning sets using MS Teams. Table 4 summarises this group's experiences, from the facilitators' perspectives, along with the actions implemented.

**Table 4.** Observations of the sets moved from F2F AL to VAL.

| Facilitators' views                                                                                                                                                      | Actions                                                                                                                                                                                                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Technical challenges – some experienced significant problems with using technology, others less so<br>People did not join or dropped out                                 | Needed to provide technical support to all VAL sets and learnt to start set meetings at 10-minute intervals<br>Needed to set up parallel communication to check and used WhatsApp & email, as well as admin support |
| Some people on camera and some not, so it was difficult to know if they were participating<br>Unable to read body language from little face in a small box on the screen | We had to advise people to make sure they had a camera facility                                                                                                                                                     |
| Difficult to see if people were on their own and concern for confidentiality of set                                                                                      | Some people were in shared offices with others in background, so needed to advise them to find quiet place                                                                                                          |
| <b>Set members' views</b>                                                                                                                                                | <b>Actions</b>                                                                                                                                                                                                      |
| Really appreciated that AL could continue in this new format, as for many, this was the only time they had to focus on their leadership development and share challenges | There was a sense of 'comrades in adversity' and it was useful to highlight Revans comments on this to the set.                                                                                                     |
| Sense of 'second best' after previously experiencing F2F                                                                                                                 | <b><i>This comment was only raised by these groups and not to those in VAL only sets</i></b>                                                                                                                        |

The set members' observations meant that early meetings were often fraught and, for those who had previously experienced face to face, there was a frequent wish to get back to this. However, the pandemic continued, and this was not possible. One participant stated:

'We are working 24/7 in the supermarket, so why can't you organise action learning face-to-face?'

*Others said:*

'I really like that we can still meet virtually as it is the only time I get to think about my leadership challenges. I just wouldn't be able to do this face to face'.

'So many of us are infected and isolating, the action learning is the only time we get to communicate with each other'.

During this time, facilitators reported variable levels of participation. For example, in the retail sector, people in supermarkets were under intense pressure, whilst those in the department stores, which had closed down, suddenly had more time to read, write and reflect on their learning. Similarly, in the NHS, some people (medical staff) were working on wards and reported that the only time they had was when they were isolated and not able to work.

### VAL only

In Autumn 2020, the challenges of the pandemic continued, and clients were reluctant to meet F2F, and so, a further 5 new cohorts started with a totally online programme delivery, aiming to return to F2F as soon as restrictions were lifted. This now provided the opportunity to research VAL with people who had no prior experience of F2F AL on the programme, adding a valuable new perspective to the study.

These cohorts were generally larger, each with up to 6 action learning sets running concurrently, so it was quite a challenge for the programme team to simultaneously move all cohorts to remote workshops and VAL. People were already becoming reluctant

to just sit looking at a screen all day and often home situations made it more difficult for participation, such as children being homeschooled. So, there were some minor changes to the schedule and longer screen breaks added throughout each day.

The overarching approach of the facilitators was to take the previously successful F2F AL and transfer it to the virtual environment.

The facilitators reported the structure of listening then writing questions, as previously followed in F2F AL, worked particularly well in VAL, and provided a logical step by step process for set members. This involved each person describing their challenge, while the others listened in silence, then after clarification questions, the set members wrote down their questions, which they offered, hoping to provide the problem owner with new insights and actions. This was repeated for each person in the set, so averaging about 20–30 min each, in a 4-hour meeting. There was no recording of these sessions.

Early VAL sessions faced problems with set members struggling on computers without cameras, or with security issues on their own networks. Some used personal laptops and there were problems with home Wi-Fi connections. In light of these early experiences, virtual action learning sets started at 10-minute intervals and technical support was allocated. They also helped those who suddenly dropped out of the call.

After the second or third virtual action learning set, people became more comfortable with the technology, although many still had issues switching on cameras. Technical support was still required for all set meetings.

After the first VAL, there was a long facilitator review, to share experiences, identify challenges and the need for further support. Whilst technical challenges continued throughout the VAL, the facilitators became more comfortable to direct technical questions to the technical support team.

The lack of F2F contact led the VAL facilitators to dedicate significantly more time to on introductions to start developing trust. This typically involved creating a charter or contract for the set. Facilitators reported that this took longer than in a F2F set, supporting Pauleen's (2003) explanation of the greater need for relationship building in virtual teams. For those that started virtually, there was significantly more time spent on contracting at both the first and later meetings. This was seen as an important way to gain trust, although many were concerned about whether they could reach the same level of trust in the virtual environment. By not recording meetings, this helped maintain confidentiality within the set. Caulat (2022a) suggested that virtual meetings can be effective without cameras, however the facilitators in this study strongly preferred the set members to use their cameras. They said that seeing people's faces was very important to build trust within the set.

The facilitators reported some differences and concerns about levels of engagement. This was sometimes due to technical struggles with network connections, with people switching off their cameras, saying they needed to do this to keep connected. The facilitators commented on the challenges of not being able to see the set members, and not being able to read body language in the set. In addition, they were concerned if people suddenly dropped out, as they did not know if it was a technical problem or there was some other reason they wanted to leave. These interruptions disturbed the flow of the set meeting.

People also seemed to find it easier virtually to drop out and take another call, leave for a meeting or go home early. This would have been more obvious in a face-to-face environment. On one occasion, some people arrived and said they could only stay for a short time, requesting that they presented their challenge first. This caused some friction

with other set members and emphasised the importance of gaining commitment to the action learning process at the beginning. Facilitators then encouraged people to respect the set and at least add a comment in the chat to explain if they were leaving early.

On a more positive note, the facilitators reported how the use of the 'hands up' function in virtual sessions helped them to manage the discussions, as it indicated who was ready to contribute next.

One very clear benefit of VAL for all was the ability to continue with action learning remotely, as this avoided the time costs of travelling. However more importantly, this was seen as a safe way to engage with each other without the risk of infection.

This study highlighted both advantages and disadvantages of F2F AL and VAL, with the underlying question of whether VAL is considered as a 'lesser' option for action learning, as stated by those that moved from F2F AL to VAL, but also the facilitators with many years of F2F experience who were comfortable with reading the body language and managing the physical environment in a room. This raises the possibility that there was some degree of resistance to change from the facilitators or perhaps researcher bias, based on the facilitators' experience. Perhaps if facilitators had been selected with a background of remote working, there would have been different results? The people in VAL only sessions did not report any sense of it being a lesser option, as for them this was their only experience with many reporting positive reactions. The following Table 5 summarise the facilitators' perspectives of the advantages and disadvantages of F2F AL and VAL.

The sets that were VAL only, with no prior experience of F2F AL agreed the benefits of VAL, in a similar way to the earlier sets who had only experienced F2F AL. The facilitators reported that the leaders benefited from action learning, giving them time for reflection and support from peers. This led to actions that had practical impacts on both the leaders, individually, and on their performance in the organisation. Many commented on the empathy of peers, and the appreciation that they were not the only ones facing such tough issues, again supporting the concept of '*comrades in adversity*' (Revans 1998).

Leaders reported that 'being listened to' was most valuable, and they had never before been given that level of attention from colleagues. They said that they gained new perspectives and discovered different ways to approach their 'wicked problems'.

As time progressed, and as with F2F AL, leaders built up their repertoire of 'good' questions and reported being less inclined to jump to solutions with their teams, demonstrating the transferability of these techniques back into the workplace. Therefore, the benefits seen by the set members were quite similar, however there were differences identified by the facilitators.

There was perhaps a tendency for facilitators to assume that everybody would turn up physically and participate willingly. For the later sets, there was a revisiting of the contracting stage at the start of each VAL set meeting to remind people of the agreements for the set. There were some set members who had previously experienced some form of action learning and had not found it helpful and were initially very sceptical about the action learning process, but many found the Revans 'classical action learning' different and better, so eventually came around. There were some who were reluctant to share personal challenges, and this may have been because they were cynical or lacked trust in the set or process.

**Table 5.** Facilitators' perspectives of F2F action learning and virtual action learning.

| VAL Advantages                                                                                                | Disadvantages                                                                                                               | F2F AL Advantages                                                                                                                | Disadvantages                                                                                        |
|---------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|
| Engagement achieved by dedication to initial contracting and repeating at subsequent sets – takes longer time | Took longer to contract and then reiterating contract                                                                       | Engagement improved by physically going to a room and having time allocated for AL – when they were in the room, they were there | Facilitators are more comfortable with process – known and used for many years                       |
| Good technology and connections can enable people to be seen on screens                                       | Technological challenges for facilitators and participants – disrupted set meetings and needed technical support throughout | Knowing room is private space helps build trust and confidentiality                                                              | Need to coordinate facilitator and set members to schedule of dates and locations then booking rooms |
| 'Hands up' feature helps identify who is ready to speak                                                       | Took longer to gain trust                                                                                                   | Seeing real people and reading body language encourages people to trust each other                                               |                                                                                                      |
| Avoids infection                                                                                              | People dropped out for calls and left early more readily                                                                    | Contracting – can check if people are accepting decisions more easily                                                            |                                                                                                      |
| Technology can make it easier for scribe to note questions in chat etc.                                       |                                                                                                                             |                                                                                                                                  | Need to provide scribe with technology (could be paper) to note questions and actions                |
| Saves time spent travelling to AL set                                                                         |                                                                                                                             | Easier to pick up subtle signs of lack of engagement                                                                             |                                                                                                      |
| Saves costs of travel to business school / hotel and room hire                                                |                                                                                                                             | Can intervene if people become upset e.g. pause and have break or 121                                                            | Costs – booking rooms in hotel / business school and travel costs to location                        |
| Opportunity for facilitators to learn and develop new skills                                                  |                                                                                                                             |                                                                                                                                  |                                                                                                      |

### One facilitator commented:

'I was never quite sure if they were really engaged or just paying lip service. I found this harder to pick up in remote sessions'.

There was still a need to allocate a 'scribe', to ensure documentation of questions and actions. Whilst face-to-face action learning required people to do this by writing paper notes or typing up a short document, Virtual action learning seemed easier and quicker as people could just put their questions in the chat. The questions were then given to the problem holder so they could just concentrate on listening to the questions in the meeting. There was no obligation for them to answer questions, although most would answer one or two questions that triggered new insights.

The final research question about the benefits of VAL to leaders is best expressed by the following comments from those on the programme.

'I find the action learning very beneficial. The process is simple to understand and encourages listening and open-ended questions. I find it makes me use my curiosity hat and I learn with my colleagues what their challenges are. Meeting virtually is actually better for me and having the cameras on makes a huge difference. I feel it is a safe place'.

'I enjoyed the fact the [scribe] was writing the questions as we went in the chat box. I always get very worried that I am missing something when writing for other people, so that really helped me'.

'It was an honour to receive the attention of such thoughtful people'.

There were also interesting comments on how leaders took learning into the workplace, for example:

'I was running a team in the CCU (critical care unit), and we started using action learning in our team huddles to try and work out what to do next. We were in a complex difficult situation and needed as many brains as we could to try and identify what we should do'.

Similarly, one leader reporting a colleague commenting on their development and reported this unsolicited feedback:

'My colleagues reported that I ran meetings much better (shorter and focused), and they liked how I asked people questions more, so we did not get distracted'.

Whilst some of those that had transferred from F2F AL to VAL tended to report VAL as a lesser or second-rate experience, the people on the VAL only programmes reported very positive experiences.

## Discussion

This study aimed to explore the differences between facilitating F2F AL and VAL, and indicated that both approaches can be effective. The key differences for VAL included the technical preparation, then the introduction of VAL to the set members, with significantly more time spent on relationship building and contracting. The process for VAL required small alterations, such as screen breaks, but many questioning techniques such as 'questioning bootcamp' or could still be applied. This technique focused the set on the thoughtful asking of questions.

The importance of using reliable technology with good technical support proved essential, and the facilitators had to be trained and knowledgeable. This was very much learnt through experience in this study, but it does indicate the additional technical competencies for high-performing facilitators (Stewart 2006) to establish credibility. This led to a better understanding, of recruiting people with appropriate technical skills and experience for VAL.

In a similar way, there were assumptions made about the set members' technical skills, and their IT, so maybe it would have helped if there were additional technical sessions for set members to try and minimise potential technical issues. At this time, technology such as MS Teams and Zoom was well-developed and being adapted by many of these organisations, so people were becoming more adept at using it, which is something that held back many of the earlier studies.

The next key difference for the facilitators was the need to introduce VAL to the set members, and dedicate more time to explaining the action learning process, introductions and particularly contracting. This supported Byrd (2019), on the importance of building relationships and gaining trust, with more intensive concentration on this at the start. In VAL, it was also considered necessary to repeat the contracting stage, at later sets. The use of processes to help people ask questions at a deeper level was used in both F2F AL and VAL, but the facilitators working in VAL tended to introduce additional short activities such as the 'questioning bootcamp' and listening exercises. Therefore, the differences between F2F AL and VAL tended to be more focused on the

start of VAL, with greater emphasis on establishing trusting relationships between the facilitator and set members.

In this study, the facilitators worked together from the start of the pandemic, taking a very positive attitude to VAL. The majority did not have prior experience or technical backgrounds, so it was a steep learning curve. The approach taken to experiment with different technologies was helpful both to acquire technical skills and see the advantages and limitations of different software options. The facilitators quickly came to realise that it would be very difficult to simultaneously concentrate on the set and deal with technical enquiries, leading to the provision of technical support throughout. There were many discussions about how to facilitate without physical cues, and this led to the insistence on cameras, as much as possible. The action research methodology supported this iterative learning, as it was possible to take the learning from these reviews and then introduce it into the next cycle of action learning. The facilitators produced a short list of useful tips to guide new VAL facilitators, as shown in Appendix 1.

This raises a further question. Should we consider VAL to be a directly equivalent experience to F2F AL or should it be considered as a different new experience? Cho and Egan (2023) proposed VAL as a new theme to AL, whereas this study had taken the approach of transferring F2F AL to VAL, but still using classical action learning.

Some leaders set themselves up as self-organised / self-managed action learning sets (Pedler and Abbott 2013), inside and outside their organisations. This was most interesting and indicated that they had the confidence and knowledge to do this. Later reports indicated some of these sets are still going and this would make an interesting piece of further research.

This study suggests that with appropriate consideration, VAL can be set up as an effective process as part of a leadership development programme. There were many lessons learnt, but the indications are that it worked better if the programme started with either F2F AL or VAL. In recent years, there were a limited number of studies of blended approaches, (Hauser, 2010; Stewart and Alexander, 2006; Curtin, 2016) typically starting with F2F AL but then including VAL sessions, but findings from this study imply that this should be introduced at the start of the programme. The challenge of the move from F2F AL to VAL in this study was partly caused by their initial expectations of having F2F AL throughout the programme, but also due to the fact that they had enjoyed the time spent with their sets at the business school, so found it a lesser interaction when they were just at home on their laptops.

In summary, those leaders that started with VAL only programmes reported benefits very similar to those on the F2F AL only programmes.

## Conclusion

This paper has endeavoured to bring together the findings from a study, initially intended to explore the benefits of leadership development with action learning. However, due to the pandemic, and the introduction of apprenticeships, the direction changed, and provided the opportunity to explore the differences between facilitating F2F AL and VAL, with data from 12 facilitators across 37 F2F AL and 45 VAL sets.

The findings indicated both commonalities and differences between VAL and F2F AL. People that had transferred from F2F AL to VAL mid-programme reported some negative

views, considering VAL a lesser experience than F2F AL, whilst others reported it as a benefit and were pleased to be able to continue with their sets. However, the data from those that started with VAL only was very positive, and similar to that of people that had experienced F2F AL only programmes.

However, whilst keeping the predominant approach of Revans' classical action learning, VAL required significantly more emphasis on the introduction of action learning, contracting and creating of charters, supporting the importance on relationship building and trust (Pauleen 2003; and Aspinwall, Pedler, and Radcliff 2018). This study emphasised the need for good technology that would enable facilitators to see the set members on cameras and reported improved ways to manage questions using hands-up feature and chat boxes.

The facilitators in this programme had not been selected on the basis of their technical skills, and this may have led to some potential researcher bias, with facilitators having a natural preference for F2F AL. However, the role of experienced action learning facilitators was invaluable, as they learnt to deliver virtual action learning, often 'unlearning' their earlier scepticism of technology.

There were some points in this study that were only touched upon and would merit further investigation. The benefits of both F2F AL and VAL to the people on the programme were apparent throughout, however there were occasional comments about resistance from people outside the programme yet still in the organisations. This supports some of the challenges discussed by Pedler and Attwood (2011), Pedler and Abbott (2013) and Cho and Egan (2023) on organisational support for action learning and this would make an interesting follow-on study.

Lastly the reports of some people setting up action learning in their own organisations has always proved fascinating, as a way of providing sustainable leadership development and peer support, and it would be most interesting to see if they could do this using VAL only. If achievable, this implies a more collaborative approach, bringing virtual action learning into the leadership development space, and the leader's workplace, with reduced costs and improved convenience. The challenge of organising rooms and travel costs has often been cited as reasons for self-organised action learning to fade away, so would VAL be a more sustainable follow-on alternative?

Throughout these programmes, there was a persistent theme in the participants' comments about the value of peer support and reference to 'comrades in adversity', which was seen as an essential contribution to their leadership development. So, despite the deployment of new technology, and the challenges of the pandemic, it was very interesting to see this core aspect of Revans' approach to action learning still delivering such important and valuable benefits to leaders today.

## Disclosure statement

No potential conflict of interest was reported by the author(s).

## Notes on contributor

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## Appendix

### 1. VAL facilitators recommendations

The following summary is used for training new VAL facilitators.

1. Provide longer introduction to the action learning approach
2. Dedicate more time to contracting and agreeing a set charter
3. Encourage all to commit to be present at all sets and for total duration, and how to communicate if not possible
4. Make sure the set have private and quiet locations (not in shared offices)
5. Ensure all speak at the first set
6. Agree scribe role and format of documentation e.g. chat or word document
7. Agree to use 'hands up' to monitor who speaks
8. Reminders of contract / charter at later sets
9. Use processes such as writing questions rather than speaking, especially at the start of VAL
10. Use techniques such as 'Questioning Bootcamp' to help set members refine questions
11. Endeavour to offer all opportunities to speak at all sets, but acknowledge this is not always possible so be flexible

12. Ensure frequent screen breaks during the session
13. Allocate experienced, technically trained and consistent facilitation
14. Allocate technical support and additional admin to support sets
15. For multiple concurrent sets, start at interval of about 10 min apart
16. Continually review the process at the end of each set