WORK-APPLIED LEARNING
for Change

Selva Abraham

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SELVA ABRAHAM

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FOREWORD

"Leadership and learning are indispensable to each other."
- American President John F. Kennedy

Leadership and learning remain indispensible for the continued growth and prosperity of South Australian managers and their organisations.

Learning does not stop when we leave school; it is a lifelong journey and our workplaces provide us with new experiences and opportunities.

As a young law student, I could never have imagined the education, skills and experiences which awaited me in my role as a Senator for South Australia and previously as the former head of the union representing thousands of fast food and retail workers.

I commend the Australian Institute of Business for its strong belief in work-applied learning and research, enabling students to confidently bring their workplace experience into the classroom.

Practical experience meshes with academic pursuits and the students acquire invaluable insight into the challenges and potential opportunities back in the real world of business and management.

I welcome the publication of this book which offers fascinating examples of work-applied learning. Whether you work in the government, industry, health care or education sector, there is much to learn from its contents.

Senator the Hon. Don Farrell
Federal Parliament, Canberra

FOREWORD

Many have considered and debated the case for and against the interrelatedness of Action Learning and Action Research. Much debate has also occurred on the definitions and descriptions of Action Learning and Action Research. The consequence of such thought and opinion is a rich variety within the fields that are these meta-methodologies. Action Learning, Action Research Association Inc (ALARA) has long encouraged the debate and promotion of Action Learning and Action Research around the world.

For this reason, I welcome this book. As Selva Abrahams acknowledges (p. 6), there are many views on the meaning and method of implementation of Action Learning and Action Research. The Work-Applied Learning (WAL) model is an interesting example of going beyond the discussion of these variations and using a fused model to extract the most from the intervention for the client organisation. The "wheels within the wheels" of the mini-cycles within major cycles produces a highly flexible approach that creates learning for individuals, organisational learning, and rigour in the intervention.

The three examples from client organisations demonstrate these qualities in WAL. The reader will see the flexibility of WAL in the Global Carriers Group's example (Chapter 3). The organisation used the first major cycle of WAL for individual and organisational learning. The second major cycle helped the organisation deal with the Asian financial crisis of the late 1990s.The diverse project outcomes identified by the Papua New Guinea Internal Revenue Commission (p. 130) reflect the breadth of the impacts the methodology can have on an organisation. Outcomes included developing a business plan, creating understanding amongst the executive on their own roles and work practices, building stronger relationships and breaking down hierarchical barriers.

Selva Abraham and I have discussed the difficulty of gaining organisational commitment to Action Learning and Action Research. Organisations too often see the former as a fad and the latter as too theoretical or not rigorous enough. As described in this book, organisations can gain much from WAL, and the flexibility in methodology does not come at a compromise to measurable outcomes. As any good Action Learning / Action Research intervention requires, WAL is an evolving concept. Further enhancements and opinions are likely, and, I dare say, welcomed by Selva and AIB. ALARA, of course, will also welcome further debate and use of these methods.

Colin Bradley
President
Action Learning, Action Research Association Inc
www.alara.net.au

ABOUT THE AUTHOR

Selva Abraham MBA, PhD

Selva is the Chairman of the Australian Institute of Business (AIB), which he established as a management consultancy in 1984.

AIB has since evolved into a business school which offers undergraduate and postgraduate qualifications in business and management and which are accredited within the Australian Qualifications Framework. In fact, AIB is the first (and still the only) private business school in Australia that is authorised to offer doctoral programmes. In addition to its education programs, AIB also has a work-applied learning research centre and a consultancy arm, all oriented towards using action research, action learning, reflective practice and case research.

Selva obtained his MBA from Henley Management College – Brunel University, UK, and then his PhD from Flinders University, South Australia.

Over the years, Selva has been involved in many management development and change projects, working with private, public and community organisations. These include Motorola, Intel, Banque Nationale de Paris, Société Generale, Eastern Pretech, Australia Post, Light Regional Council, Aboriginal Sobriety Group to name but a few.

In addition to on-going consultancy projects, he has two action research books to his name and his current work at AIB includes leading a team of researchers in work-applied learning, using action research, action learning and reflective practice.

ABOUT THE CONTRIBUTORS

Colin Brimson MBA
Colin has worked for Australia Post for more than 40 years, and has served in several managerial roles for the past 25 years. He was State Manager, Delivery South Australia/Northern Territory for more than 10 years before being promoted to his current position of General Manager, MAIL Services South Australia/Northern Territory.

Mohamad Bin Hashim MBA, DBA
After serving in various managerial capacities at Shell Malaysia for 16 years, Mohamad started and grew a small domestic tanker business to an international shipping conglomerate, Global Carriers Berhad, which was listed on the Kuala Lumpur Stock Exchange in 1996. From 2003, he has pursued other business interests and is now Chairman of a major residential and commercial development company in Malaysia.

Alois Daton MBA, DBA
Alois has been with the Internal Revenue Commission, Papua New Guinea (IRC) for over 30 years. Since 2007, he has been the Commissioner of Tax at IRC. Prior to this appointment, he held different managerial positions in the Customs division, as well as in the Corporate Services and Tax Technical areas of IRC.

Dennis Hardy MA, PhD
Dennis has had a distinguished academic career at Middlesex University, UK, where he has held various senior management roles, including that of Deputy Vice-Chancellor. He specialises in the areas of local government strategy and urban planning and has a keen interest in work-applied learning and research. Currently, he is the Dean, Australian Institute of Business.

ACKNOWLEDGEMENTS

No matter how much one is fired to write a book, every author will know that one is also reliant on the contribution of others. This case is certainly no exception and I am grateful to a number of good friends and colleagues.

For a start, the book could not have been completed without the willingness of past and present research degree candidates and corporate clients of the Australian Institute of Business to share their findings. As the following pages will show, I am grateful, especially, to Colin Brimson, Mohamad Bin Hashim and Alois Daton for contributing chapters based on their own research and practice, and to Brian Carr for confirming the value of Work-Applied Learning in developing a group of senior managers in his own organisation. I am also indebted to Dennis Hardy, Dean of the Australian Institute of Business, for his invaluable feedback and encouragement in my journey of writing this book.

When it came to the production side of the project, I should like to thank Nathan Robert for preparing the diagrams, and Nicola Markus for making timely use of her proof-reading skills. Barbara Velasco executed the design to her usual high standards.

My two sons, Sanjay and Vinod, have helped me in ways that they would probably not themselves recognise. Their boundless energy and determination to make a success of the Australian Institute of Business has been a constant source of inspiration. In practical terms, by taking on more of the managerial and commercial duties that not so long ago I was performing myself, they have given me the space to engage in consulting, research and writing this book.

Most of all, my gratitude is directed to my wife and long-time business partner, Param. The precision derived from her legal background has, time and again, kept me on the right track. Her questioning, cajoling and, most of all, encouragement has given me the strength to pursue this challenging project to completion. She has been tireless in working with me at every stage.

In spite of this expert help on a variety of fronts, if there are any remaining errors and omissions, the responsibility for these rests with me.

PREFACE

It is now more than fifteen years since the publication of my earlier books on Action Research.[1] Since then there have been many developments to take into account.

Over time, I have been able to reflect on my original ideas and have found ways to take these forward. I have worked closely with subsequent cohorts of research candidates and with corporate clients; together, we have applied the Work-Applied Learning approach to solve a variety of 'real world' problems. Inevitably, in this ensuing period I have also enjoyed the advantage of reading what other writers have published, and I gratefully acknowledge the stimulus that this has provided. And, of course, even in this relatively short period the world itself has changed in so many ways, calling for a fresh appraisal of issues faced by today's managers.

For these various reasons, it was timely for me to return to the drawing board and produce something new. I am convinced that a Work-Based Learning approach, with Action Research and Action Learning (ARAL), remains every bit as valuable for managers as it was when I first ventured into the field. I am also convinced that, having tested it more widely in practice, it is even more robust than it was previously. It is this 'Mark 2' model that I am presenting in this book.

True to the spirit of Work-Applied Learning and ARAL, the book is a blend of concepts and practice. As well as my own ideas on the conceptual basis of this approach, I have been able to call on the experience of fellow researchers at the Australian Institute of Business. Thus, the book contains diverse examples to demonstrate the application of Work-Applied Learning and ARAL, as well as a further exploration of ideas. Nothing stands still, of course, and in the conclusion I point to an undiminished need to further refine the model as we continue to learn more. There is no end to the process, only further cycles of planning, acting, observing, reflecting and evaluating.

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[1]Selva Abraham (1994) *Board Management Training for Indigenous Community Leaders Using Action Research: The Kuju CDEP Learning Experience*. South Australia: Port Lincoln Kuju CDEP Inc.; Selva Abraham (1997) *Exploratory Action Research for Manager Development*. Toowong, Queensland: ALARPM Inc.

CHAPTER 1

WORK-APPLIED LEARNING
AN ACTION RESEARCH AND ACTION LEARNING
(ARAL) PERSPECTIVE

INTRODUCTION

This chapter provides the background to the concept and practice of Work-Applied Learning (WAL) for change. I have been researching and testing this concept over the past thirty years, with practitioners and researchers as a management consultant and as a professor at the Australian Institute of Business (AIB) in Adelaide, South Australia. My initial readings and experiences in Work-Based Learning (WBL) led me to extend it to WAL through the use of a fused Action Research and Action Learning approach.

THE JOURNEY FROM WBL TO WAL

My experience in WBL started during a management training program for bankers in Singapore. I was part of a team of three consultants in the program, but as I was new in the consultancy, I was asked to observe and record the proceedings and make a contribution on practice if and when called upon. The other two consultants in the team were specialists in systems management and they presented their sessions by reading from a text by Louis Allen (1964) and explaining the theory. This they did for eight three-hour sessions held every other evening.

   The only exciting aspect for me and the participants was that the two consultants took turns in presenting alternate sessions, but other than that, it was the same process of reading the text and explaining the theory. Some participants confided to me that they could do the reading themselves. I was bored, the participants were bored, and what shocked me the most was that at the end of the eight three-hour sessions, the two consultants believed they had done a wonderful job. I, on the other hand, believed that the program could have been delivered in a much more interesting manner. Because of this experience, I decided to look for opportunities that would help me to learn and grow my consultancy and presentation skills.

From 1971 to 1975, I gained invaluable experience in project management and general management in several organisations specialising in event management, marketing and public relations. During that time, I was one of the ten founders of the Marketing Institute of Singapore. The inaugural speaker for the Institute was Patrick Kehoe, who was then a university professor in Canada working closely with Bill Reddin (1970) on managerial effectiveness.

Patrick Kehoe and I subsequently explored the viability of working together and as a result, in 1975 we established a management development consultancy in Singapore. I managed this organisation as its executive director, working also as a management consultant, until 1983. It was a very enriching and meaningful experience under the mentorship of Patrick Kehoe as he coached me on how to facilitate management workshops.

The next step was to gain a postgraduate qualification through an MBA program. But the challenge was to find a program that would allow me to combine work and study. In 1979, I enrolled in the MBA program at Henley Management College in the UK as it suited my requirements. It was very fortunate that this program had a focus on WBL as I was able to resolve problems in my consultancy business by applying many of the concepts I had learnt. I completed the MBA in 1981 and during the following years secured several projects which enabled me to improve my management consultancy skills.

Since 1981, I have been exploring the use of the WBL process with private companies, banks, public sector entities and community organisations in Singapore, Malaysia and Australia. In 1984, I migrated to Australia, where I established a management development consultancy called Gibaran Management Consultants (Gibaran), now renamed as the Australian Institute of Business, which focused on WBL.

The results of my forays into exploring WBL were very encouraging. However, in the late 1980s, many participants on my programs started expressing an interest in obtaining a certificate to attest to their learning.

As a result, I entered into negotiations with the Australian Institute of Management (AIM) in South Australia to explore the viability of AIM providing certificates to managers who completed the programs delivered by my consultancy. After reviewing the content, assessment and quality of the work-applied Gibaran Management Development Program, AIM agreed to confer its Diploma of Management to all managers who successfully completed that program.

My desire to investigate further into WBL in the context of change management led me to undertake a PhD with Flinders University, South Australia where I investigated WAL using Action Research. I completed my PhD in 1993.

In 1994, the Mount Eliza Business School became the first private business school in Australia to be accredited to offer an MBA degree under the Australian Qualifications Framework. By then I had developed a senior management program, namely, the Gibaran Executive Development Program (GEDP). I presented to the then Chief Executive of the school, Dr Barry Ritchie, a proposal for the GEDP to be granted recognition as being equivalent to a postgraduate certificate.

After intensive scrutiny of the program by Dr Ritchie and his team, the GEDP was granted credit for the equivalent of one third of the Mount Eliza MBA program, which meant that participants who completed the GEDP were to be awarded the Mount Eliza Graduate Certificate in Management. There were two cohorts of the GEDP that benefited from this arrangement with Mount Eliza, but this ended in 1995 when its MBA program was merged with that of Monash University.

This incident made me determined to seek direct accreditation for Gibaran programs. As a result, over the next few years, Gibaran succeeded in obtaining accreditation within the Australian Qualifications Framework for the Bachelor of Business Administration, Master of Business Administration, Master of Management (Research, Master of Management (Work-Based Learning), Doctor of Business Administration and Doctor of Philosophy courses.

These courses used the work-applied research methods of action research, case research and reflective practice in varying degrees. Some of the academics who made major contributions to crafting the curricula and the rationale for these courses were Emeritus Professor Chad Perry, Professor Ron Passfield and Professor Peter OBrien.

Over the years, I have been reflecting on the views of various writers on WBL, including workplace learning (see footnote for writers)[1]. As a result, I have collated the main features of WBL and provide them in Table 1.1.

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[1]Alderman and Milne (2005); Argyris (1994); the Australian National Training Authority ANTA (1998); Bassi, Cheney and Lewis (1998); Boud and Symes (2000); Costley (2001); Fox and Grey (2000); Garnett, Costley and Workman (2009); Helyer (2010), Jarvis, P., Holford, J. & Griffin, C. (2003)); Matthews (1999); Roodhouse and Mumford (2010); Nichols, (2000); Raelin (2000; 2008); Resnick (1987); Ruona, Lynham and Chemack (2003); Scribner (1986); Schon (1983); Watkins and Marsick (1992); Wenger, (1999; 2003).

*Table 1.1 – Features of Work-Based Learning*

Work-Based Learning:
- focuses on tasks
- is a collaborative activity resultant of an experience or problem for which there is a known knowledge base
- is different from what normally happens in business schools
- is a practical and cognitive process
- is learnt by working, not through reading or observing work
- has a variety of instructional strategies away from the classroom
- is self-directed; creative; expressive; involves feeling; is continual and reflective
- includes action projects, learning teams and other inter-personal experiences, including mentorship
- provides opportunities for professional practice, critical analysis and reflective thinking
- involves knowledge creation and utilisation as collective activities when learning becomes everyone's job.
- involves thinking, and evaluating theory and practice
- links coursework assessment with workplace practices
- can lead to the attainment of qualifications

It can be seen from the above table that WBL appears to focus on learning in the workplace by individuals or as teams, for the purpose of application. However, while facilitating and researching various WBL programs over the years, I have developed and refined a model which is an extension of WBL. I have termed it the Work-Applied Learning (WAL) model. In addition to creating learning in the workplace by individuals or as teams, the use of this WAL model has also resulted in the collective learning of the teams to create organisational learning and change. The WAL model is described in the next section.

WORK-APPLIED LEARNING MODEL

The WAL model that I have developed recognises the workplace as the crucible of learning for change. This model has been specifically researched in the context of Work-Applied Learning for managers to learn and introduce change. While incorporating the features of WBL, WAL is grounded in a fused Action Research method and Action Learning process ("ARAL"). It is the addition of the ARAL approach which leads to not only individual learning by the managers and team learning, but also organisational learning and change as the managers and their teams plan, act, observe, reflect, evaluate and validate work-based projects through the action research (AR) cycles of WAL. Figure 1.1 illustrates the learning and change through AR cycles.

Figure 1.1 – Learning and Change through AR cycles.
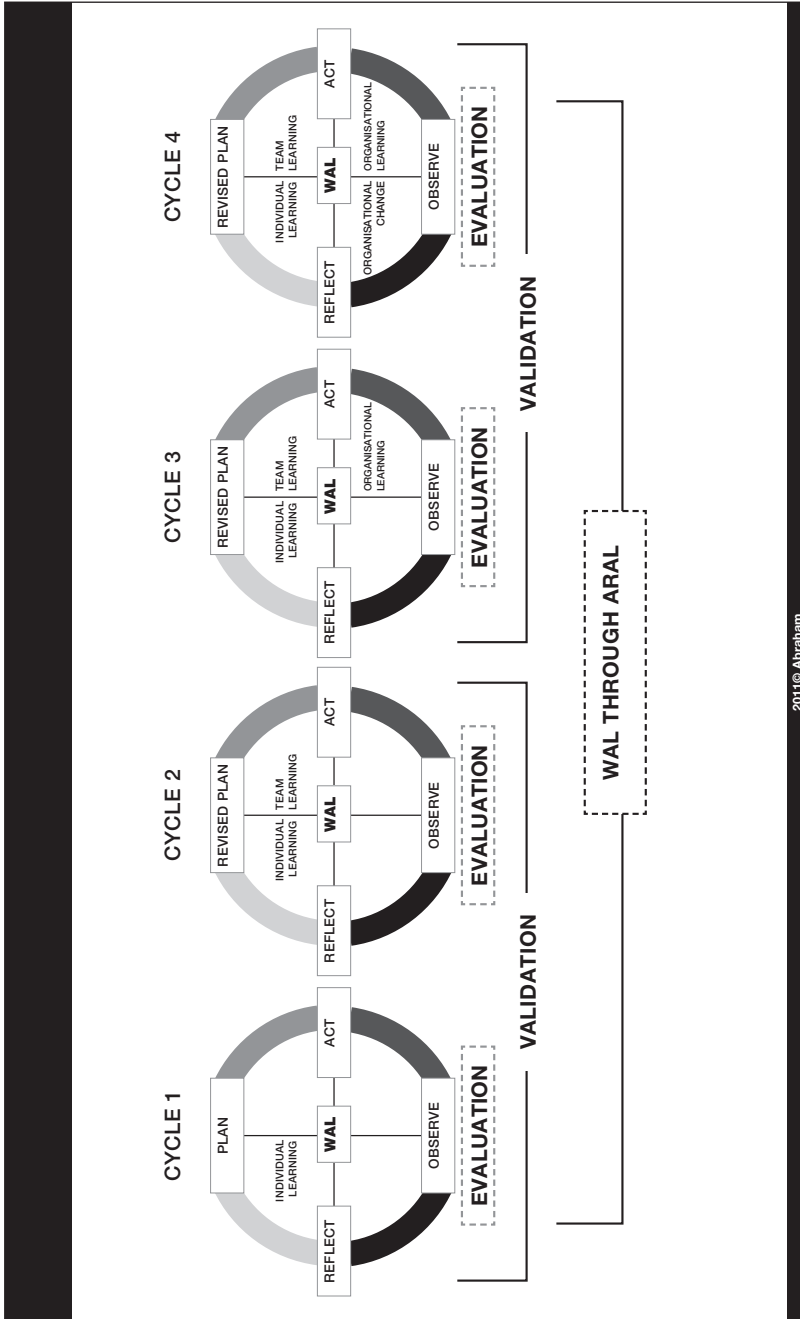
The following section will describe the ARAL approach.

FUSING ACTION RESEARCH AND ACTION LEARNING (ARAL)

Action Research is a practical research method and should not be confused with the Action Learning process.

Lewin's (1946, 1947, 1951, 1952) concept of Action Research and Revans' (1982) concept of Action Learning are similar in some respects as both are problem-focused, action-oriented and utilise group dynamics; however, they differ in a number of major respects. Revans (1983) is more interested in encouraging "questioning insight" than in solving problems. In his own words, Revans (1983, p.11) said:

> Action Learning... requires questions to be posed in conditions of ignorance, risk and confusion, when nobody knows what to do next; it is only marginally interested in finding the answers once those questions have been posed.

Action Research, on the other hand, was designed as a means by which change could be introduced in problematic situations to bring about a noticeable improvement. Revans places more emphasis on the development of managers' skills and abilities than Lewin, who was more concerned with making a contribution to science, and he accords outside experts a far lesser role.

Lastly, while Revans admits that Action Learning can become a cyclical process, it is not essentially cyclical in nature like Lewin's concept of Action Research.

There is another aspect, however, in which Action Research and Action Learning are alike. The original concepts first voiced by Revans and Lewin have not stood the test of time intact and inviolate. Rather, opinions about what Action Learning and Action Research mean and how to implement them are many and varied. Consequently, every group that wants to undertake an Action Learning project or an Action Research program must consider these various opinions and then decide what form of research or learning is appropriate for its needs.

In my study of Work-Applied Management Development using Action Research (Abraham 1997), I identified twelve Action Research characteristics that emerged in my research. Peters and Robinson (1984) in their survey of the literature on Action Research characteristics also noted most of the same characteristics. Table 1.2 provides a summary of the twelve characteristics of Action Research which I have refined over my years of research.

Table 1.2 – General Characteristics of Action Research

	CHARACTERISTIC	SUMMARY DESCRIPTION
1	Problem Focus	The Action Research method is problem-focussed in the context of real life situations. The solving of such problems in a research sense would contribute to professional practice and the development of social science knowledge.
2	Action Orientation	The diagnosis of a problem and the development of a plan to solve the problem can only be considered to be action-oriented if the action becomes part of a process to implement the plan. This brings an action element to the solving of an immediate problem of the organisation which has strategic change implications for the said organisation.
3	Cyclical Process	The Action Research method involves cycles of planning, action, observation, and reflection (evaluation). Thus, the cycles of the Action Research method allow the group members to develop a plan, to act, to observe and to reflect on this plan, to implement the plan and then to modify the plan, based on the needs of the group members and the requirements of the organisation and situation. A record of the processes of each cycle enables its strengths and weaknesses to be reviewed so that modifications and strategies can be developed for future cycles.
4	Collaboration	Collaboration is a fundamental ingredient of the Action Research method, because without a team effort to solve problems in an environment of participation, Action Research cannot exist. Collaboration on group problems using the Action Research method can be viewed as a continuum from total dependence on the facilitator, who acts as a leader directing the group problem-solving process, through to the total management of the problem by the group members with the facilitator acting as a resource person. The position of the facilitator and the group on this continuum depends on the situation and the needs of the group.

Table 1.2 – General Characteristics of Action Research (contd.)

	CHARACTERISTIC	SUMMARY DESCRIPTION
5	Ethical Practice	Community interests, improvements in the lives of the group members, justice, rationality, democracy and equality are some of the themes of 'ethical' behaviour. The ethical basis of Action Research is an important characteristic to consider, because the Action Research method involves, to a large extent, groups of people with limited power who are open to exploitation. It requires the researcher to concede their personal needs so that the needs of the group are given the highest priority.
6	Group Facilitation	The success of the Action Research method will depend on how well the group can operate as an effective team. An understanding of group dynamics therefore seems essential in facilitating this process and dealing with problems that arise during the Action Research cycles
7	Creative Thinking	The AR Group members will experience creative thinking as they go through stages of saturation, deliberation, incubation, and illumination where the group members look for different options and seek the opinions of different relevant parties to validate those options.
8	Learning and Re-education	Action Research can be viewed as re-educative, since it contributes to a change in the knowledge base of the organisation, a change in the skills, attitudes and knowledge of the individual group members, and a change in the skills and knowledge of the researcher. It also makes a contribution to several of the social sciences.
9	Naturalistic	If one accepts that Action Research should be scientific but that there are problems in adopting a positivistic model of science and applying it to social science settings, then it follows that a naturalistic approach is appropriate for the Action Research method. The approach involves qualitative descriptions recorded as case studies rather than laws of cause and effect tested experimentally with statistical analysis of data.

Table 1.2 – General Characteristics of Action Research (contd.)

	CHARACTERISTIC	SUMMARY DESCRIPTION
10	Emancipatory	The changes experienced by the group members during the Action Research process can contribute to some improvements in their lives and may also have wider social action and reform.
11	Normative	The normative characteristic of Action Research implies that the social 'norms' of the group are not only considered during the research, but, in order to bring about change in the group, they are modified during the Action Research process.
12	Scientific	Since the Action Research method does have a scientific basis and can provide an alternative to the positivistic view of science, it is essential that the research be conducted in such a way that it can be defended against criticisms of lack of scientific rigour.

In the 1990s, Graham Arnold, Rod Oxenberry and I (Abraham, Arnold & Oxenberry 1996) wrote on the fusing of Action Research and Action Learning in the context of organisational learning and change, and developed a word formula to capture the integrated nature of Action Research and Action Learning (ARAL).

We (Abraham et al, 1996) first identified the features specified by some authors as being necessary "ingredients" to produce Action Research and Action Learning and expressed them in word formulae as follows, with the symbols used being explained in Table 1.3:

Action Learning:

$$S + P + A\ (+F) \rightarrow AL$$

Action Research:

$$G + P + A + F + C + R \rightarrow AR$$

A scrutiny of the above formulae reveals that the only differences are i) the Action Research method includes a facilitator, whereas it could be optional in the Action Learning process, depending on the situation; and ii) the Action Learning process requires an Action Learning set whereas the Action Research method requires an Action Research Group.

Table 1.3 – Symbols Used in the Word Formulae (Abraham et al, 1996, p.17)

SYMBOLS	DESCRIPTION
S	The Action Learning <u>set</u> comprising individuals who come together to investigate solutions to shared problems and to learn from each other. There is no requirement that the set members are from the same organisation.
P	The <u>problem</u> to be addressed. Both Action Learning and Action Research share this problem-focused characteristic.
A	Both Action Research and Action Learning are <u>action</u>-oriented. The group or set takes positive action in response to the ideas and suggestions generated through questioning and discussion.
G	The nature of the Action Research <u>group</u> may be rather different to the set described in Action Learning. The group comprises members of an organisation or community and could also include "Researchers" who may be seen as an integral part of the group since they work in a collaborative manner with the group for change and knowledge development.
F	The term "<u>Facilitator</u>" has been placed in brackets in the action learning word formula to indicate the disparate views amongst the authors on whether or not a facilitator should be part of the set.
C	The <u>cyclical</u> nature of Action Research. Lewin (1946 and 1947) indicated that the spiral nature of steps was fundamental to Action Research. His steps started with diagnosis, followed by cycles of planning, action and reflection.
R	The <u>Researcher</u> in Lewin's original view assisted the group. While some writers question the need for a Researcher, the role of a Researcher as a consultant to the group is widely supported by other authors.
AL	Action Learning
AR	Action Research

This suggests that, in fact, Action Learning could be considered as a subset of Action Research. As a result, Abraham, et al (1996) proposed the ARAL model that fuses Action Learning and Action Research as follows: **AL + C + R $\rightarrow$ AR.**

The following section describes a typical WAL program which incorporates the fused ARAL model and shows how managers and their teams experience creative learning as they go through a WAL program.

THE WAL PROGRAM IN ACTION

A typical WAL program comprises a number of AR cycles and the phases within each AR cycle are as follows:

- AR group meetings;
- Knowledge Workshops;
- Work-Based Phases;
- joint observations and reflections; and
- monitoring and evaluation of the cycle.

Figure 1.2 shows the cycles of WAL with summaries of the phases.

Where an AR cycle spreads out from six to nine months, it is possible to have several AR mini-cycles embedded within. Each AR mini-cycle would have the same phases as the AR cycles but compressed in a shorter timeframe.

All through the WAL program, four different types of facilitative roles emerge. These are the Facilitative Consultant; the Facilitative Tutor; the Facilitative Leader; and the Facilitative Trainer.

Descriptions of these facilitative roles are provided in the different phases of the WAL program in the following sections of this chapter.

AR GROUP MEETINGS

In a typical WAL program, the AR group normally includes a Facilitative Consultant, appointed by the client organisation, the managers involved in the program as participants, the chief executive and relevant stakeholders.

The Facilitative Consultant is either an internal or external change agent specialised in WAL with conceptual knowledge and practice in change management.

The Facilitative Consultant helps in the establishment of the AR group and works with the AR group in: the WAL program design; clarification of the organisational problem; identification of the organisational change project (change project); mentoring the individual managers in the change project and individual departmental team projects; and reflecting with and coaching the managers as they implement departmental projects with their team members.

Figure 1.2 – AR Cycles within the WAL Program

AR CYCLE 1

AR CYCLE 2

AR CYCLE 3

AR CYCLE 4

REFLECTION · EVALUATION · OBSERVATION · ACTION · PLAN · REVISED PLAN
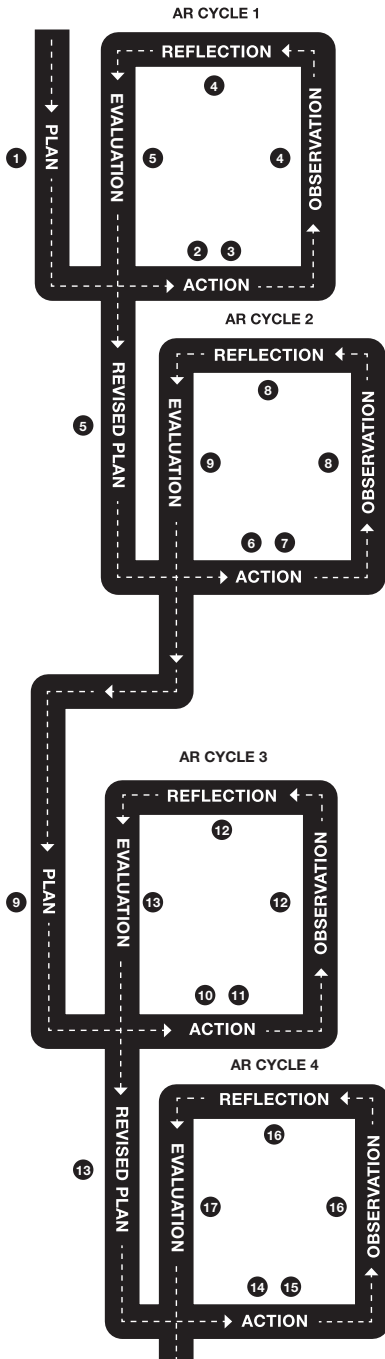
1. First AR Group meeting.

2. Knowledge Workshop: Facilitative Tutor's input on management knowledge. Reflection against Work-Based Project issues.

3. Work-Based Phase: Managers apply their knowledge during the Work-Based Phase with their action learning teams.

4. Joint observation and reflection by the Facilitative Consultant and managers on the Knowledge Workshop and Work-Based Phase.

5. Second AR Group meeting: First Monitoring and evaluation session with CEO, the managers and the Facilitative Consultant. Re-planning for Cycle 2.

6. Knowledge Workshop: Facilitative Tutor's input on management knowledge. Reflection against work-based issues.

7. Work-Based Phase. Managers apply their learning during the Work-Based Phase with their action learning teams.

8. Joint observation and reflection by the Facilitative Consultant and managers on the Knowledge Workshop and Work-Based Phase.

9. Third AR Group meeting: Second monitoring and evaluation session with CEO, the managers and the Facilitative Consultant. Re-planning for Cycle 3.

10. Knowledge Workshop: Facilitative Tutor's input on management knowledge. Reflection against work-based project issues.

11. Work-Based Phase. Managers apply their learning during the Work-Based Phase with their action learning teams.

12. Joint observation and reflection by the Facilitative Consultant and managers on the Knowledge Workshop and Work-Based Phase.

13. Fourth AR Group meeting. Third monitoring and evaluation session with CEO, the managers and the Facilitative Consultant. Re-planning for Cycle 4.

14. Knowledge Workshop: Facilitative Tutor's input on management knowledge. Reflection against work-based issues.

15. Work-Based Phase. Managers apply their learning during the Work-Based Phase with their action learning teams.

16. Joint observation and reflection by the Facilitative Consultant and managers on the knowledge workshop and Work-Based Phase.

17. Sixth AR Group meeting. Fourth monitoring and evaluation session with CEO, the managers and the Facilitative Consultant.

The Facilitative Consultant also provides conceptual knowledge during the knowledge workshops on ARAL and organisational change, facilitative leadership and reflective practice. These workshops are supplemented by reading materials, videos, and access to the online library. Web conferencing could also be used in place of these workshops.

The Facilitative Consultant continually guides the AR group members to critically review, reflect and evaluate the WAL program and the projects against the performance indicators of organisational change and departmental project outcomes; the ARAL process; individual and team learning.

At the first AR group meeting, the AR group will normally:

i)   clarify the organisational problem that is to be addressed, identify a change project to be undertaken by the managers and also establish departmental projects for each manager's team;

ii) agree on the WAL program design, including: the number and duration of workshop days; the number and duration of the Work-Based Phases; the number of mentoring and reflective sessions; the time allocated for each manager for feedback; and the scheduling of dates, taking into account the job demands and organisational culture;

iii) establish performance indicators for the change project; and

iv) clearly establish and agree upon the program objectives and the terms, conditions, obligations and commitments of the parties, namely the chief executive of the organisation, the managers, and the Facilitative Consultant.

Whilst the first AR group meeting would normally be face-to-face, subsequent meetings could be held on a face-to-face basis or as web-conference meetings. During these meetings, the managers would share their experiences from the Work-Based Phases and discuss the project outcomes, process outcomes and learning outcomes that are to be achieved and any deviations that they would like to be corrected.

KNOWLEDGE WORKSHOP PHASES

The Knowledge Workshops (either face to face or by web-conferencing) could range from one day to four days, depending on the needs of the managers and the demands of the organisation. The managers will be introduced to business and management concepts (for example: strategy; marketing; finance; human resources; operations; and leadership) including application relevant to the change project by a Facilitative Tutor who has relevant postgraduate qualifications and experience in that knowledge area. The Facilitative Tutor could be either an external person or an employee of the organisation.

This knowledge provided is supplemented by distance learning and reading materials and an online library. The Facilitative Tutors will show the managers the relevance of the knowledge to their change project. The managers are encouraged to question their change project, think critically about how to apply the knowledge to the project, how to scope and reflect on the project, and how to develop a draft plan for implementation using ARAL. This is the Work-Applied Learning experience that managers go through, not only during the Knowledge Workshops, but also when working with their teams during the Work-Based Phases.

Also during the Knowledge Workshops, the Facilitative Tutors will work closely with the managers to establish their departmental projects. Each departmental project would be established based on the needs of the department or division of the manager and would be linked to the change project. At the end of the first Knowledge Workshop, the managers would be required to present a draft plan for the change project, including the departmental projects that are integrated with the change project.

Table 1.4 provides a template for an ARAL change project plan. It can also be adapted for departmental project plans and be used by the managers to share their plans with their management.

Table 1.4 – ARAL Change Project Plan Template

The need for the project:
- Describe the background to the issue or the problem that led to the project being chosen
- Provide evidence to show that there is a need to resolve this problem or issue.

The purpose and outcomes of the project:
- In a precise and concise manner, establish the purpose of the project.
- What are the project outcomes that are to be achieved?
- What is the expected learning outcome of the managers of the team and why?
- What are the process outcomes?

The Learning Team:
- Who are the members of the learning team?
- Justify why they qualify as a member of the team.
- What are the expected learning outcomes of each of these members?
- What activities are to be put in place to achieve the project outcomes?
- What type of budget is needed to achieve the project objective?
- What is the timeframe and cost for the achievement of the project and learning outcomes.

The justification:
- Justify why the change plan is action research- based.
- Justify why the departmental projects are action learning projects.

WORK-BASED PHASES

Each Knowledge Workshop is followed by a Work-Based Phase, during which time the managers will return to their workplace. After the first Knowledge Workshop, they will be equipped with knowledge and process skills as facilitative leaders.

The managers as facilitative leaders guide their departmental team members (learning team) in their workplace to plan and implement the work-based projects.

As the managers go through the WAL program, they will become more knowledgeable about the concepts of facilitative leadership and Action Learning which they would have acquired through the Knowledge Workshops and which are supplemented by reading materials and access to an online library.

During the Work-Based Phase, the managers will work with their learning teams to:

- clarify the department's problem;
- identify the project;
- plan the departmental project to resolve the problem;
- refine the scope of their departmental projects;
- clearly establish the project outcomes;
- establish their own learning outcomes as well as the learning outcomes of the learning team members;
- establish the process outcomes;
- obtain the support of their management and, if necessary, further refine the departmental projects as agreed with management;
- implement the project as a departmental team using an Action Learning process.
- undertake directed reading on: the knowledge area required; facilitation leadership skills and group dynamics (this directed reading should continue all through the project implementation phases);
- establish working relationships between learning team members and other departments;
- ensure opportunities for effective reflection and review by their learning team members;
- keep detailed diary notes of the process as well as the project outcomes and learning outcomes;
- establish and continually encourage a working relationship between the learning team members; and
- consult and reflect with the chief executive and vital stakeholders as well as resource experts when required.
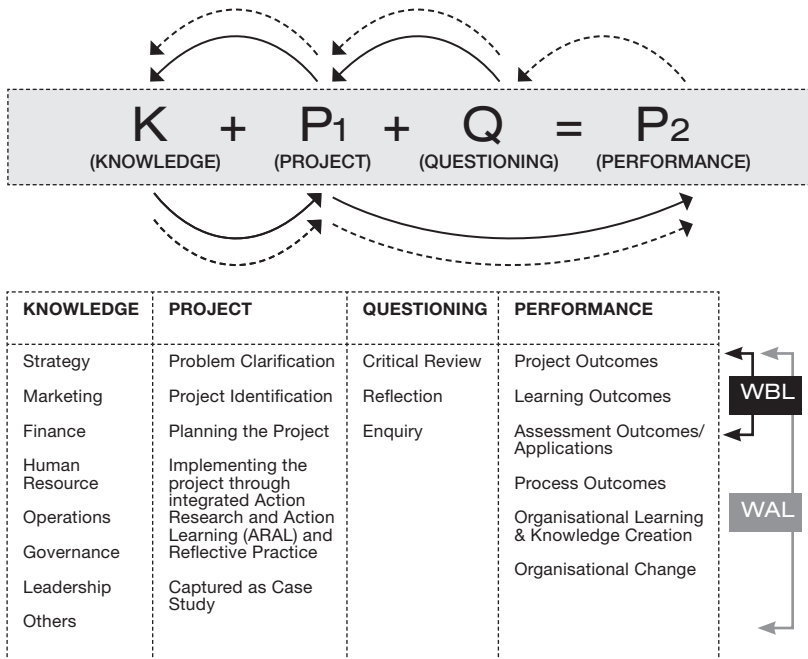
During the Work-Based Phase, there could arise a need for the learning team members to obtain competency based training to assist them in the implementation of the project. Such knowledge could be provided by a Facilitative Trainer.

The Facilitative Trainer would help the learning team members acquire competence in a relevant business or management area and understand how it is applied to their projects. This process is undertaken through workshops and directed reading. The Facilitative Trainer could be either an external person or an employee of the organization and must have a qualification in the relevant business or management area and also practical experience in that area.

At the end of these workshops, the learning team members will have the competency necessary to complete the projects. The managers and the Facilitative Trainer will work together to reflect and provide support to the learning team members.

As managers and their learning teams plan and implement their departmental projects, they undergo a Work-Applied Learning experience. The Work-Applied Learning experience can be summarised in a word formula as $K + P_1 + Q = P_2$. Figure 1.3 illustrates the Work-Applied Learning formula and the relationship between Work-Based Learning and Work-Applied Learning.

Figure 1.3 – The Work Applied Learning Formula

$$K \;+\; P_1 \;+\; Q \;=\; P_2$$

(KNOWLEDGE) (PROJECT) (QUESTIONING) (PERFORMANCE)

KNOWLEDGE	PROJECT	QUESTIONING	PERFORMANCE	
Strategy	Problem Clarification	Critical Review	Project Outcomes	
Marketing	Project Identification	Reflection	Learning Outcomes	**WBL**
Finance	Planning the Project	Enquiry	Assessment Outcomes/ Applications	
Human Resource	Implementing the project through integrated Action Research and Action Learning (ARAL) and Reflective Practice		Process Outcomes	
Operations			Organisational Learning & Knowledge Creation	WAL
Governance			Organisational Change	
Leadership	Captured as Case Study			
Others				

Whilst managers reflect on questions in the context of their projects, they experience creative thinking through stages of saturation, deliberation, incubation and illumination as they allow their minds to look for different options. They then seek opinions of other independent parties to validate those options.

The stages of the creative thinking process were initially formulated by Graham Wallace (1926) and since then they have been commented upon and adapted by different writers, including Tripathi and Reddy (2007). One such adaptation is provided below:

> **Saturation:** Becoming thoroughly familiar with a problem, with its setting, and more broadly, with activities and ideas akin to the problem.

> **Deliberation:** Mulling over these ideas, analysing them, challenging them, rearranging them, and thinking of them from several viewpoints.

> **Illumination:** A bright idea strikes, a bit crazy perhaps, but new and fresh and full of promise; you sense that it might be the answer.

> **Incubation:** Relaxing, turning off the conscious and purposeful search, forgetting the frustrations of unproductive labour, letting the subconscious mind work.

> **Accommodation:** Clarifying the idea, seeing whether it fits the requirements of the problem as it did on first thought, re-framing and adapting it, putting it on paper, getting other people's reaction to it.

During the continuous steps of creative thinking, managers learn as they move from a stage of unawareness to awareness, comprehension, conviction and finally, to actioning their work-based projects.

Whilst these five stages of communication and learning were originally used in the context of marketing communications and external customers, they are equally relevant to internal customers, namely managers and staff of organisations. Thus, Wimmer, R (2011) writes:

> All people pass through these stages for every decision they make or anything they learn.

> 1. All people pass through the stages at different speeds
>   – there is no universal timing.
> 2. Not all people make it to the Action stage.

The only way to move people through the five stages is through *repetition of message*. In most cases, people do not make decisions (or learn something) after only one exposure to a message. The process nearly always requires several exposures.

Figure 1.4 captures the cyclical creative thinking and learning process in WAL as the managers and their teams plan, act, observe, reflect, evaluate and validate their work-based projects through the AR cycles. At the core of this thinking and learning process is the WAL formula of $K + P1 + Q = P2$.

Figure 1.4 – The Cyclical Work-Applied Creative Learning Experience
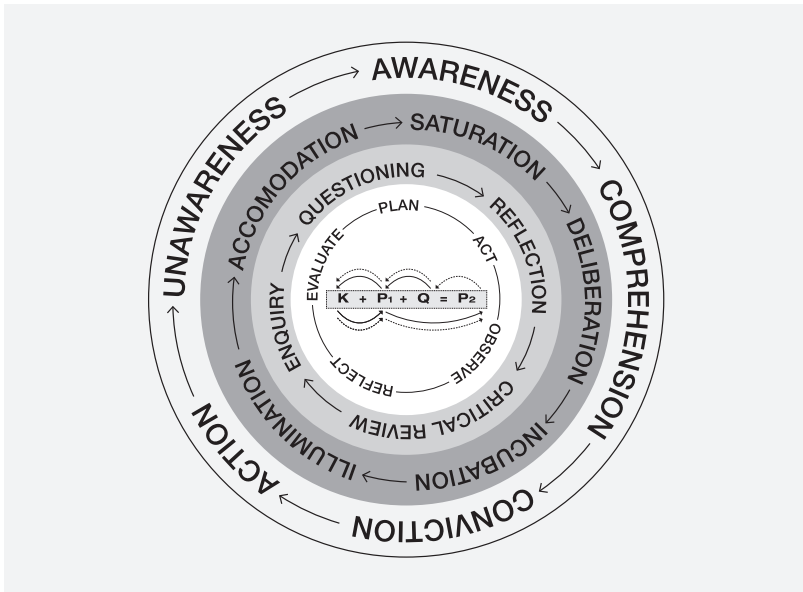
JOINT OBSERVATIONS AND REFLECTIONS

Typically at the end of each Work-Based Phase, the Facilitative Consultant will contact the managers either on a one-to-one basis or on a group basis, to seek their feedback on how the program is progressing and whether any further customisation is needed in the next cycle to make the program more effective.

EVALUATION OF THE CYCLES

After the joint observations and reflection session, the managers, the Facilitative Consultant and other AR Group members will come

together for an evaluation meeting. The data collected by the Facilitative Consultant during the joint observations and reflections phase will be discussed and the opinions will be triangulated and evaluated and re-planning of the WAL program will be undertaken.

During this meeting, the AR Group members will analyse the performance outcomes and evaluate the project outcomes, the process outcomes and the learning outcomes of the managers and their learning teams. They will also evaluate whether the AR characteristics are observed and are prevalent throughout the WAL program.

VALIDATION

Typically, a WAL program is validated at the end of every two cycles. The validation is undertaken at a meeting of the AR Group as well as other stakeholders such as direct supervisors of the managers, the human resource director and members of the Board of Directors or other relevant persons.

The managers will present reports on their current progress and other issues in the WAL program against the performance indicators, seek feedback from those present and make necessary changes to the program and their performance.

The evaluation and validation phases of the various AR cycles are depicted in Figure 1.5.

## CASE SUMMARIES OF TWO WAL PROGRAMS

This section provides case summaries of two WAL programs which show the link between the WAL model discussed previously and the actual planning and implementation of the WAL programs. The two case summaries are firstly, on the Light Regional Council (LRC) in South Australia and secondly, an international bank (which has not been named for reasons of privacy).

Case 1 – Planning the WAL Program for LRC

Program Background

The Light Regional Council (LRC) is a Local Government Area north of Adelaide, South Australia and includes the towns of Kapunda, Freeling and Roseworthy. LRC wanted to investigate ways in which they could embark upon a unique governance and community engagement process in planning and development matters. The LRC area had experienced substantial growth over the previous thirty years, and continuing expansion had resulted in an increase in staff.

Figure 1.5 – The Evaluation and Validation Process in WAL Programs
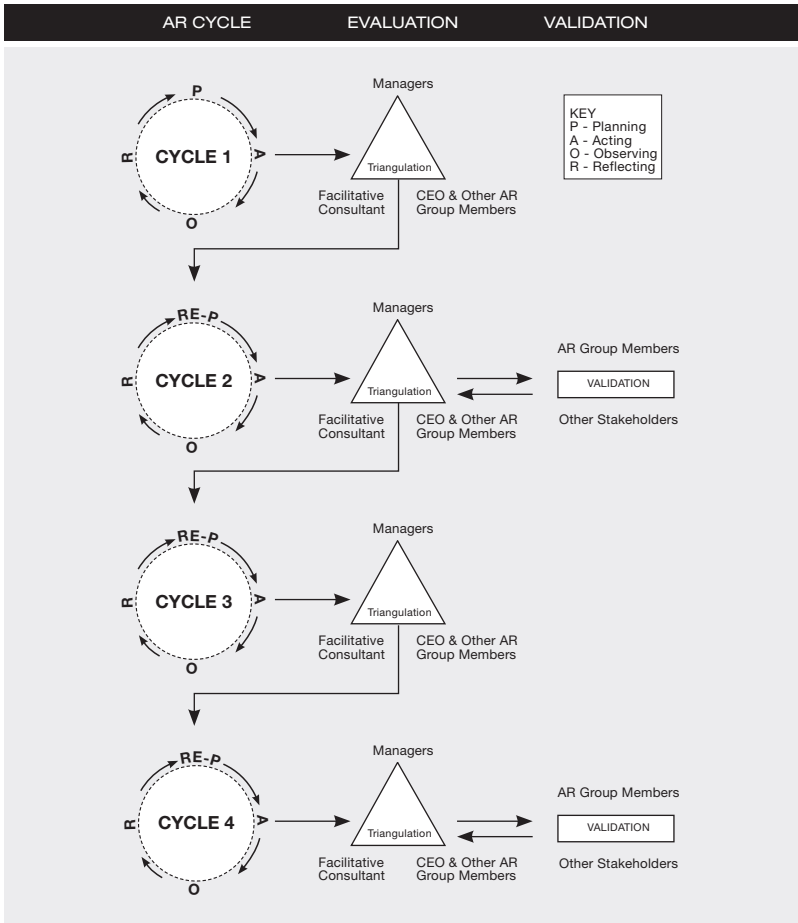
The LRC recognised that its managers would need further training and skills development if such governance and community engagement was to be successful. As a first step, they sought professional assistance from the Australian Institute of Business (AIB) to design an appropriate WAL program for six of their senior managers.

This program was titled the Work-Applied Strategic Management Development Program.

AR Group

As part of the WAL program, an Action Research (AR) Group was established. The AR Group was made up of the LRC Chief Executive Officer, Brian Carr, the six senior managers who would be the program participants, and a Facilitative Consultant of AIB.

In the first AR Group meeting, the CEO, the six managers and the Facilitative Consultant agreed on two major group projects and individual projects to be undertaken.

The two group projects identified were:

    i)   to review and update the current strategic plan of LRC; and
    ii) to develop a change management plan for LRC using ARAL.

The AR Group reviewed the proposed design of a typical mini-cycle in the WAL program provided by the Facilitative Consultant. Figure 1.6 shows the proposed design.

The AR Group members agreed on measurable outcomes for the program which are provided in Table 1.5.

Table 1.5 – Measurable Outcomes

On completing the WAL program, the managers would be able to:
- apply the knowledge gained to review the current strategic plan for the LRC and to update it for a period of four years;
- apply the concepts of change management, facilitative leadership and the ARAL process in designing a change management plan for their implementation; and
- work with the departmental teams in the planning and the implementation of the departmental sub-projects.

Figure 1.6 – A Typical Mini-cycle of a WAL Program
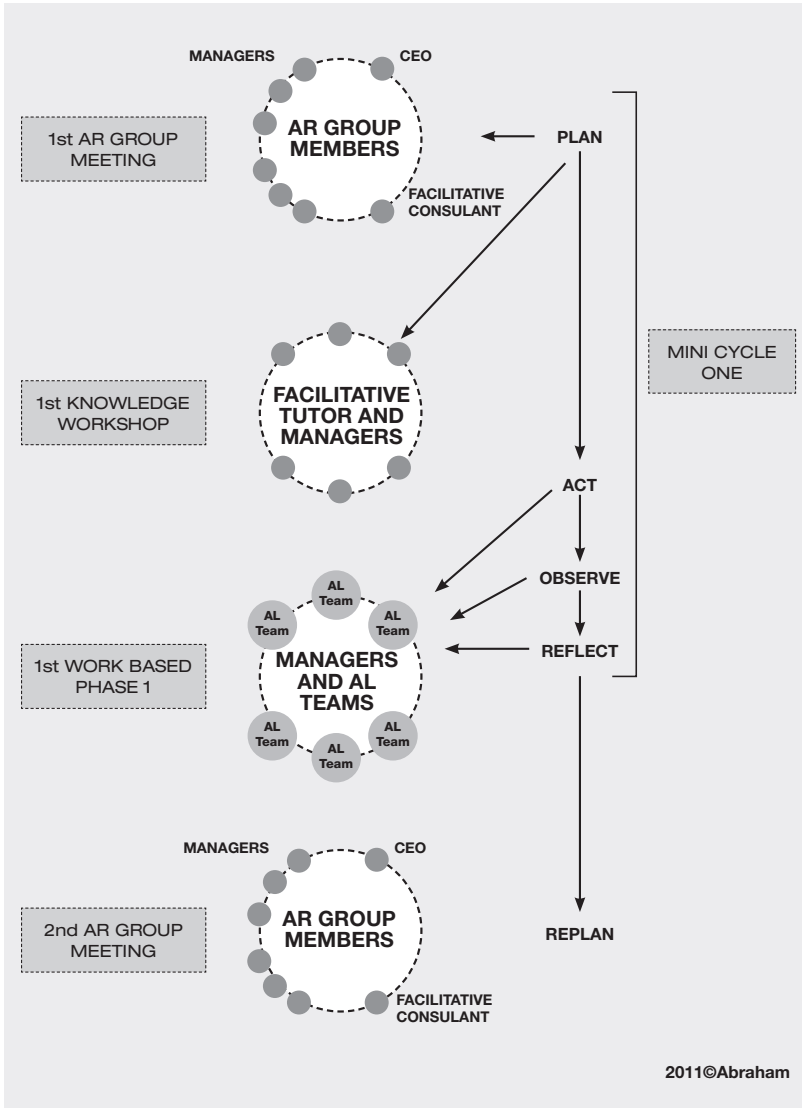
The AR group also established the obligations of all the relevant parties in the program and these are listed in Table 1.6.

Table 1.6 – Obligations of the Parties

LRC responsibilities:
- to identify the managers who would be participants in the WAL program;
- to establish an Action Research Group to work closely with the Facilitative Consultant in customising the program over the period of time, as well as to monitor, reflect and evaluate the program;
- to provide the managers with access to technical resources or research data, when required, and to rationalise and justify the strategic and change plans;
- to co-ordinate the Coaching and Reflective Sessions;
- to ensure that the instalments of the project reports are submitted to the Facilitative Consultant and CEO at least seven days before each Coaching and Reflective Session;
- to ensure the final group and individual project reports are submitted to the Facilitative Consultant, Facilitative Tutors and CEO for review and comments within six months of the commencement date of the program; and
- to pay fees and any related costs to AIB.

Obligations of the Facilitative Consultant and Facilitative Tutors:
- to participate in the customising of the WAL program with the AR group;
- to facilitate the workshops;
- to provide Coaching and Reflective Sessions to the managers at pre-arranged times;
- to review the instalments of the project reports produced by each manager, in order to give them feedback;
- to participate as a member of the AR Group in monitoring, reflecting and evaluating the progress of the program; and
- to provide feedback on the final group and individual project reports.

Managers' Obligations
- to undertake required readings during the program;
- to attend all the workshops;
- to work with their teams and with other managers, as required, to complete the group project reports and individual project reports and initiate implementation;
- to participate in the Coaching and Reflective Sessions with the Facilitative Consultant and Facilitative Tutors; and
- to finalise and submit the group project reports and individual project reports by the due date as agreed with the Facilitative Tutors.

At the end of the first AR Group meeting, the AR Group agreed that the review and update of the strategic plan would be completed within six months and that the strategic planning project would include the following individual projects: i)workforce planning; ii) infrastructure planning and maintenance planning; iii) long-range financial planning; iv) governance planning; and v) systems improvement planning.

The AR Group also agreed that they would focus on the second major group project, namely, the change management plan project, after the completion of the strategic planning project.

One of the six managers was the General Manager of Strategic Planning of the LRC. It was agreed that he would be the LRC representative for the strategic planning project and the other five managers would be responsible for the five individual projects.

Figure 1.7 illustrates the integration of the five individual projects with the strategic planning project.

Figure 1.7 – LRC Strategic Planning Project

The CEO encouraged the managers to work towards the Australian Institute of Business (AIB) Graduate Certificate in Management qualification, since this could be acquired if they completed academic assignments in addition to the group project reports and individual project reports.

THE WAL PROGRAM CYCLES

The WAL program would comprise one major AR cycle, with four AR mini- cycles, each of which had a AR Group meeting; a Knowledge Workshop; a Work-Based Phase; joint observations/reflections and evaluation. During the major AR cycle, there would be two validation sessions, one midway and the other at the end of the program.

The four mini-cycles within the major cycle are depicted in Figure 1.8. Four two-day Knowledge Workshops would be held at regular intervals over a period of six months. During the workshops, the managers would be introduced to the concepts, practice and process of strategy, change, facilitative leadership, WAL, Action Research, Action Learning and reflective practice.

The managers would be encouraged by the Facilitative Tutors to reflect critically on how to apply these concepts in an integrated manner as they:

> i) update the LRC's four-year strategic planning document; and
> ii) reflect on their learning as Facilitative Leaders in their individual project reports.

In consultation with the Facilitative Consultant and Facilitative Tutors, the managers would identify various resource experts in financial planning, infrastructure and maintenance planning, systems improvement planning, governance planning and workforce planning to help them to undertake and finalise their individual project reports.

Each Knowledge Workshop would be followed by a Work-Based Phase of one month as shown in Figure 1.8. During each Work-Based Phase, the managers would return to their workplace and work with their Action Learning teams to develop their sub-project plans as their contribution to the strategic planning document.

The managers would also work together to develop the first major project (the review and update of the strategic plan) and during this process, consult and reflect with the Chief Executive Officer.

Throughout each Work-Based Phase, the six managers would reflect and record their facilitative leadership learning and experiences in the form of individual project reports.

A fortnight after each Knowledge Workshop, the managers would submit instalments of their individual project reports and the major project report for review by the Facilitative Tutors.

Figure 1.8 – LRC Knowledge Workshops and Work-Based Phases
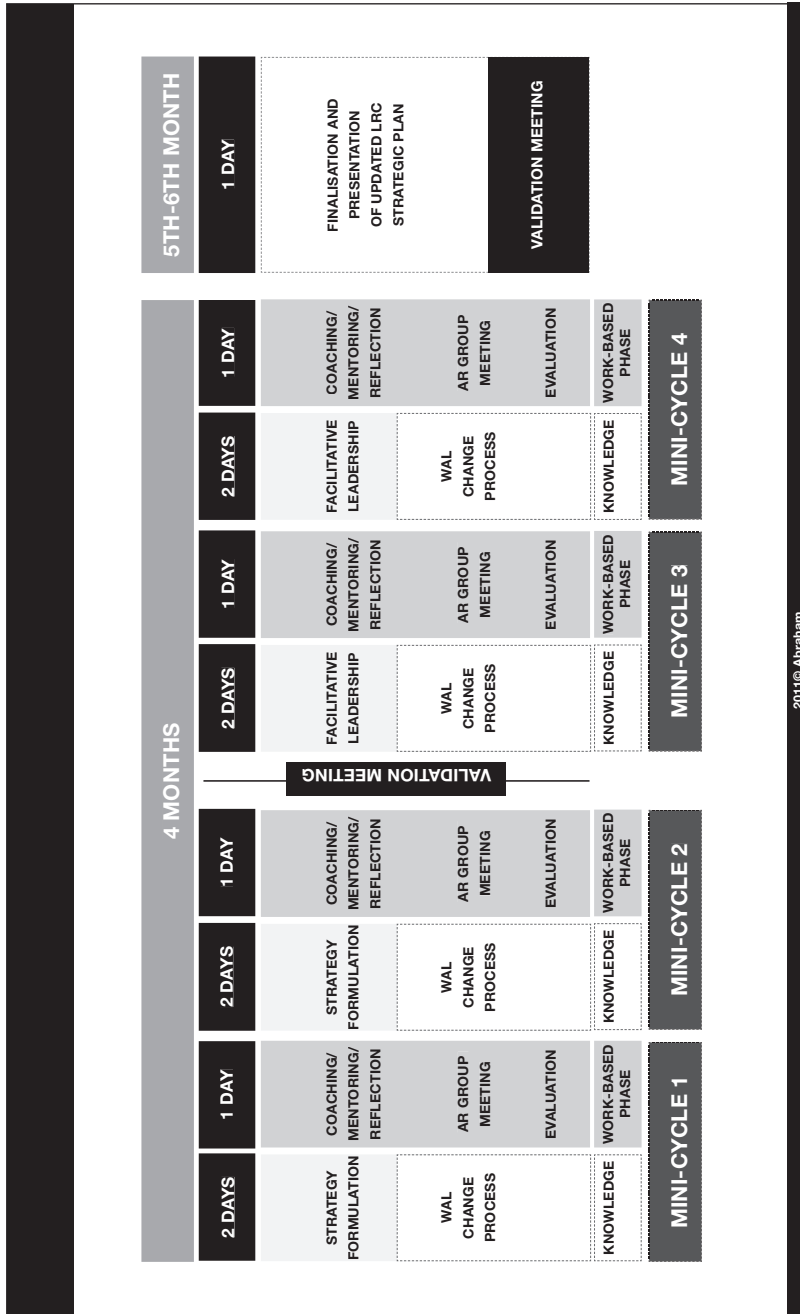
Three weeks after each Knowledge Workshop, the managers would have a Coaching and Reflection Session with the Facilitative Consultants on their major group project report on a group basis and their individual project reports on a one-to-one basis. At the end of the Work-Based Phase of each mini-cycle, an AR Group meeting would be held to reflect and evaluate the program based on the observations of the Facilitative Consultant, the Facilitative Tutors and the managers against the performance indicators of the program.

This program would be formally validated by a Steering Committee comprising the LRC Mayor, the Chief Executive Officer, Emeritus Professor Dennis Hardy and myself. This Steering Committee would meet twice, at the midway point of the program and again at the end of the program. During these two validation sessions, the managers would present to the Steering Committee the project outcomes, the process outcomes and the learning outcomes of the WAL program and reflect on their plans for implementing change.

Case 2 - WAL Program for an International Bank

<u>Program Background</u>

The management of an international bank was concerned that there was an increase in apathy towards its customers by the staff in many of its branches. This was confirmed by numerous letters of complaint from customers. One of the other concerns of management was that although frontline staff and bank officers were technically competent in banking, many lacked customer relations skills. The management believed that a Customer Relations Program needed to be planned and implemented for the bank officers and front-line staff of all its branches.

As a first step, the management decided that 60 bank officers and 200 front-line staff, chosen from across all the branches, should be exposed to the concepts and practice of effective customer relations. They suggested that the program for the officers and front-line staff be run separately and be integrated into their workplace.

This Work-Applied Customer Relations Program had two Action Research cycles, comprising AR Group meetings, Knowledge Workshops, observations and reflections, evaluation and validation.

Cycle 1

<u>First AR Group Meeting</u>

The AR Group for this program was made up of the Training Manager of the bank and two external Facilitative Consultants. The first AR Group meeting established the objectives of the program, the program design and the terms of the working relationship between the Facilitative Consultants

and the Training Manager. It was decided that a select group of bank officers would be part of the AR Group as the program progressed.

The objectives of this program as agreed by the AR Group were to:

- provide the bank officers with an understanding of the concepts and practice of customer relations and how this could be used to develop a closer working relationship with their front-line staff and bank customers
- facilitate the bank officers to work in teams to develop a customer relations guide for the front-line staff
- coach and mentor the Training Manager to develop facilitation skills and undertake facilitation
- validate the customer relations guide with the front-line staff during their two-day workshops; and
- develop and launch a customer relations campaign to further emphasise the importance of customer relations in all the branches.

The design of the Customer Relations Program had three components:

- Customer Relations Training for the 60 bank officers – these bank officers were divided into five groups of twelve each, called BOG 1 to 5. Each group attended a four-day Bank Officers (BO) Knowledge Workshop on customer relations.
- Facilitator Development for the Training Manager - whereby the Training Manager was provided coaching and mentoring in facilitation skills in order to facilitate workshops for the front-line staff.
- Customer Relations Training for the 200 front-line staff – the staff were divided into ten groups of twenty each, called FLG 1 to 10. Each group attended a two-day Front-line (FL) Knowledge Workshop on customer relations skills development.

The BO Knowledge Workshops and the Facilitator Development process for the Training Manager occurred simultaneously in Cycle 1 as shown in Figure 1.9.

Customer Relations Training for Bank Officers

The 60 bank officers were divided into five groups of twelve each, called BOG 1 to 5. Each group attended a four-day Bank Officers (BO) Knowledge Workshop on customer relations.

During the BO Knowledge Workshop for BOG 1, the twelve bank officers acquired knowledge in Customer Relations to improve their own effectiveness. Then, as a team, they used the newly learnt concepts to undertake a work-based project, namely, to develop a draft Customer Relations Guide for the front-line staff who deal with customers.

The bank officers worked as two teams of six to apply the concept of customer relations both for their own individual effectiveness and in the development of the draft Customer Relations Guide. There was a need for two Facilitative Consultants on the program because separate coaching was necessary for the two teams as they completed their draft Customer Relations Guide.

Both teams then shared their drafts with each other in a reflective session. They then reviewed the commonalities and differences and developed what they believed would be an ideal Customer Relations Guide. This process was duplicated at the BO Knowledge Workshops for the other four groups, namely BOG 2 to BOG 5, with each group developing a draft Customer Relations Guide for the front-line staff.

Each of the five groups then nominated one member to form a learning team of five officers (Learning Team). This Learning Team reviewed and reflected on the five draft guides developed by the groups and developed a final draft of what they believed would be an ideal Customer Relations Guide for the front-line staff.

### Facilitator Development for the Training Manager

Simultaneously with the BO Knowledge Workshops, the Training Manager went through a Facilitator Development process whereby she developed her facilitation skills as follows:

- by observing and reflecting with the Facilitative Consultants on the Knowledge Workshop for BOG 1;
- by being incrementally involved as a co-facilitator at the remaining BO Knowledge Workshops by contributing 10% of the facilitation for BOG 2, 20% for BOG 3, 20% for BOG 4 and 35-40% for BOG 5; and
- by presenting to the Facilitative Consultants, for their feedback, the proposed session plan and all the required material for the FL Knowledge Workshops.

Subsequently, the Facilitative Consultants provided coaching and mentoring to the Training Manager throughout the delivery of the FL Knowledge Workshops.

This Facilitator Development process for the Training Manager provided an ongoing benefit for the bank since the Training Manager could then train new bank officers and other front-line staff as well as deliver other Work-Based Learning workshops. By developing the skills of the Training Manager, the bank was investing in its own future.

Figure 1.9 – Cycle 1 – Parallel Bank Officer Workshops &
Training Manager Development Process
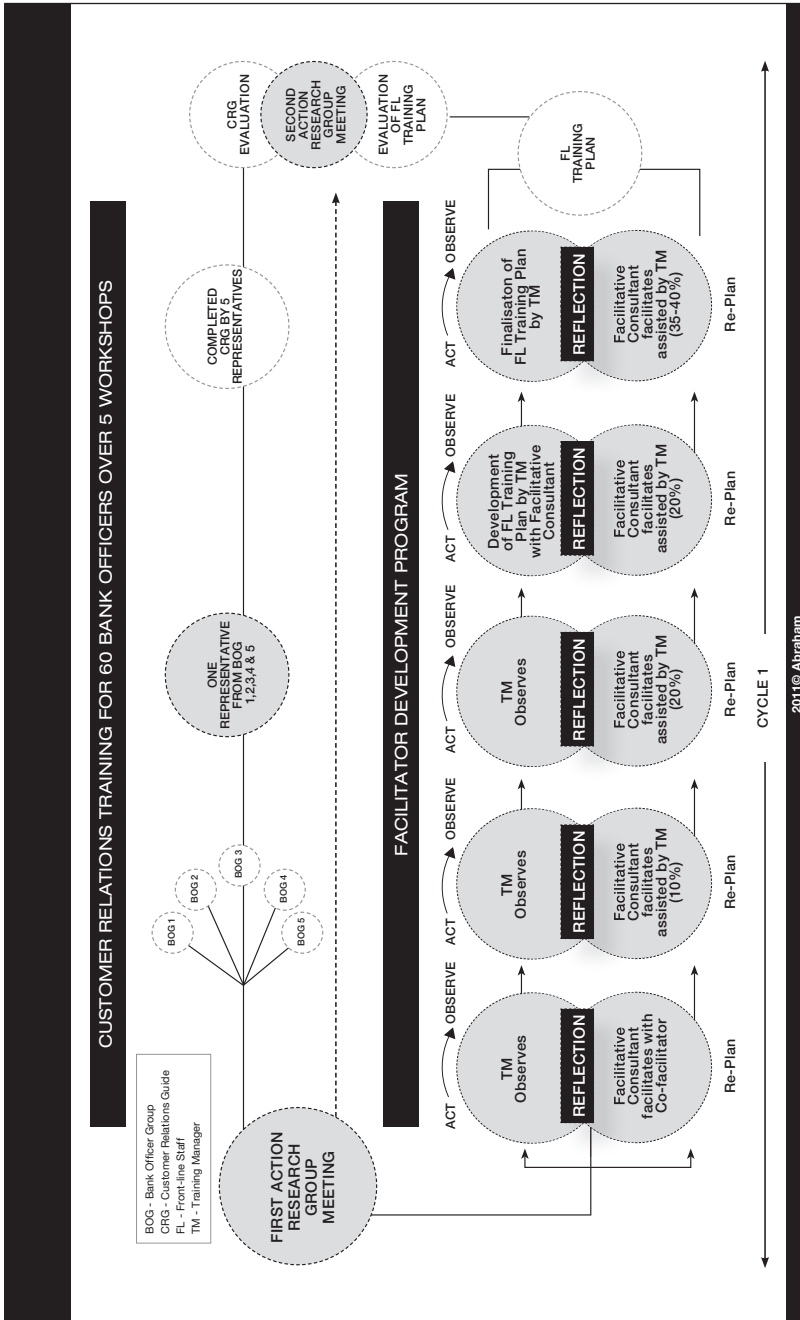
Second AR Group Meeting

From this meeting onwards, the Learning Team became members of the AR Group. At this meeting, the AR Group:

    i)   reviewed and reflected on the final draft of the Customer Relations Guide which was to be reflected upon by the front-line staff during the FL Knowledge Workshops;

    ii) evaluated the session plan and materials developed by the Training Manager for the FL Knowledge Workshops; and

    iii) reviewed and commented on the Customer Relations campaign for the branches which had been developed by the Training Manager.

Cycle 2

Customer Relations Training for Front-Line Staff

The 200 front-line staff were divided into ten groups of twenty, namely FLG1 to FLG 20. Each group attended a two-day Knowledge Workshop on customer relations. These ten workshops were facilitated by the Training Manager over a period of five months.

During these workshops, the views of the 200 front-line staff were sought on the final draft Customer Relations Guide, since they were to use the final version as their guide in the workplace. Evaluation of these workshops was undertaken after every workshop and improvements were made to subsequent workshops based on the feedback obtained.

Third AR Group Meeting

At the third AR Group meeting, the members reviewed and analysed the views of the 200 front-line staff on the draft Customer Relations Guide and incorporated these views into the final version of the guide.

They also reviewed the feedback about the workshops and summarised the improvements to be undertaken for future delivery of similar workshops.

The Customer Relations campaign was also finalised for the review of management. Figure 1.10 shows the details of the front-line staff training and the customer relations campaign.

Figure 1.10 – Cycle 2 – Front-Line Staff Training and Customer Relations Campaign
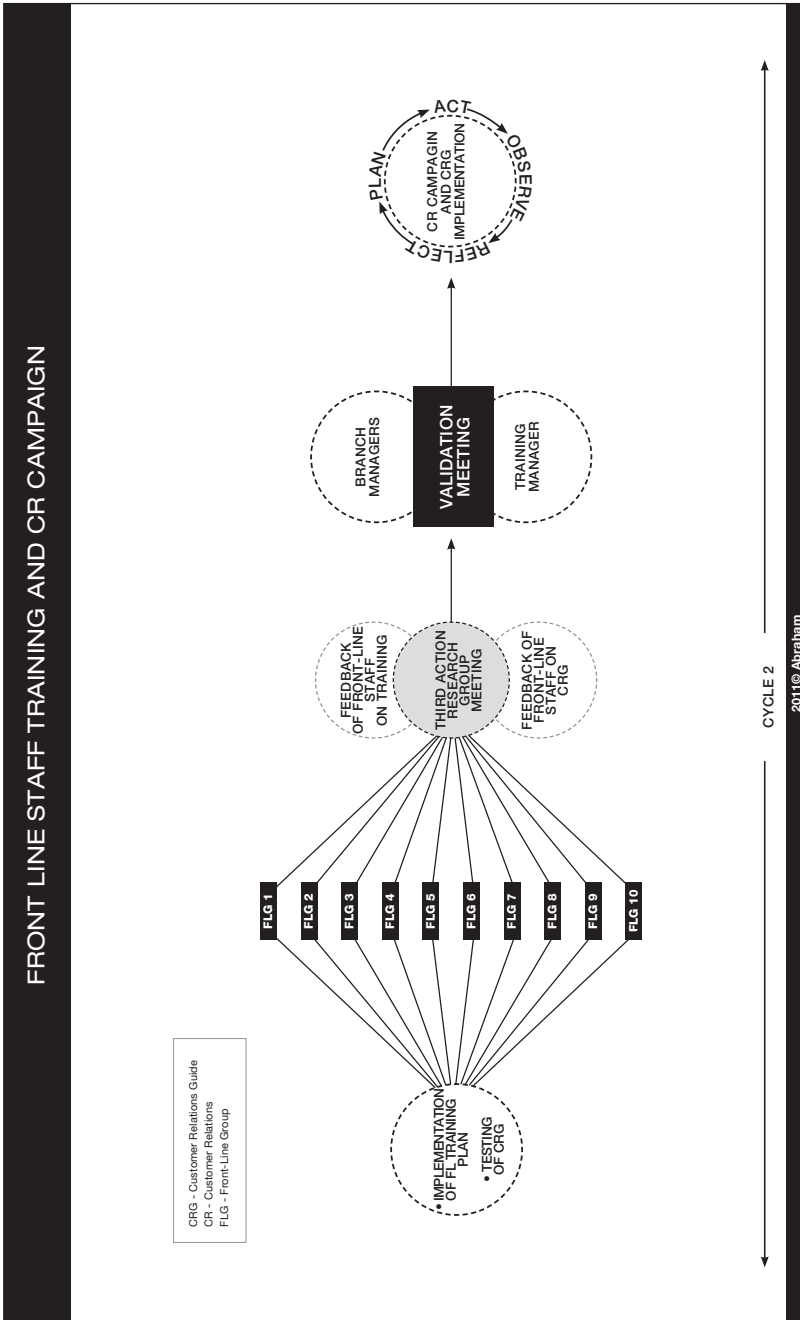
Validation

The Training Manager met with a Validation Committee comprising the branch managers and presented feedback from the following activities for its review and comment:

i)   the BO Knowledge Workshops
ii) the Training Manager's Facilitator Development process; and
iii) the FL Knowledge Workshops

The Training Manager also presented the Customer Relations campaign to the Validation Committee. After incorporation of the views and suggestions of the Validation Committee, the Customer Relations campaign was launched by the Training Manager at the bank branches.

The Validation Committee proposed that at each branch, select bank officers and front-line staff should work as learning teams to monitor and evaluate the performance indicators of project outcomes, learning outcomes and process outcomes.

Another proposal was that each branch should, through a newsletter, share with the other branches lessons learnt from the Customer Relations Program.

CHAPTER SUMMARY

This chapter has described my experiences with WBL and the creation of a WAL model, with case summaries to illustrate the use of the model in different situations.

The next three chapters will further demonstrate how the WAL model has been adapted and used in other WAL programs, whilst still capturing the features of WBL and the ARAL approach.

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"The book gives you a great structure and an encouraging and supportive set of ideas that will provide a sound foundation for using learning in the workplace as the drive for substantial organisational change.

Far from the aggressive and manipulative command and control mentality of so much management 'advice', the WAL approach humanises the process of change management. It takes people into account, not just as variables in the equation, but as stakeholders and learners whose participation and work-applied learning is critical to achieving the benefits of change.

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Paul Davidson
Associate Professor of Management,
Queensland University of Technology Business School

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