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Published online: 10 May 2023.

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ABSTRACT

Critical Action Learning (CAL) is a well-established approach to action learning. However, it has not necessarily been clear to action learning practitioners what makes CAL 'critical' and what are the implications in practice. In CAL, the facilitator has a key role in helping the set to engage with underlying emotions and power relations that are inevitably embedded in learning sets, and that both promote and prevent learning. The paper explains the main ideas of critical action learning, why facilitation is important, and how to facilitate CAL. Examples are provided from the authors' practice and eight key components are presented as a guide to facilitating CAL. The aim of the paper is to improve the action learning community's knowledge of how to facilitate critical action learning and when it is appropriate to utilize this approach.

Critical Action Learning (CAL) is a well-established approach to action learning. However, it has not necessarily been clear to action learning practitioners what makes CAL 'critical' and what are the implications in practice. In this paper we explain the main ideas of critical action learning and why facilitation is important. We then focus on how to facilitate CAL. We provide examples from our own practice and use these to identify eight key components of facilitation to provide a practice guide for facilitators. We also reflect on some of the qualities that assist individuals who want to work from this perspective. Our aim is to contribute to the action learning community's knowledge of critical action learning in practice. We conclude with some reflections on the importance of the further development and implementation of CAL as an approach to action learning that can deliver 'organizing insight' (Vince 2004).

What is critical action learning?

Action Learning Sets provide a framework for a group of people to learn and develop through open and trusting interaction (Pedler, Burgoyne, and Brook 2005). Individual

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and collective openness and trust support personal and inter-personal learning. Action learning is not only an achievement of a group of people within challenging organizational circumstances ('comrades in adversity', Revans 1982). It is also about making a difference to the organization and/or system within which action learning takes place. This might involve, for example, a group of entrepreneurs, a group of senior managers from the same organization, or members from different organizations seeking to address shared issues such as sustainability, diversity or inclusion.

Action learning involves learning from the experience of taking action. Action on pressing problems or issues that are of concern to set members is a core purpose of action learning. A primary process that supports set members to develop insight is the power of questions. Asking clear, direct, and challenging questions at the right time and in the right way drives the process of action learning. However, we observe time and again that set participants avoid or tone down the questions they pose for fear of offending or hurting a person's feelings (Rigg, Ellwood, and Anderson 2021), or for fear of transgressing unwritten organizational rules and expectations (Vince et al. 2018). The risk, therefore, is that the learning potential of questions in action learning is lost without an acknowledgement of how they are transformed by personal feelings, group emotions or unspoken behavioral, cultural, and structural norms (Mughal, Gatrell, and Stead 2018).

The term 'critical action learning' was coined by Wilmott (1994) as an idea about how to link critical management studies to management learning in practice. This idea was developed further through a focus on the importance of critical reflection in action learning (Anderson and Thorpe 2004); through an understanding of the relationship between action learning and critical social theory (Pedler 2005); and through persistent focus on the impact of emotions, politics and power relations on action learning (Rigg and Trehan 2004; Trehan and Rigg 2015; Vince 2004, 2008, 2012). CAL has been developed in varied organizational contexts, including small businesses and entrepreneurship (Ram and Trehan 2010; Trehan 2021); public sector and health service organizations (Vince 2008); and international businesses (Hauser 2012a, 2014; Hauser, Lanz, and Radl 2020).

In CAL, the role of facilitator is important in creating an environment to engage with underlying emotions and power relations that are inevitably embedded in learning sets and that both promote and prevent learning (Trehan and Rigg 2015; Trehan 2021; Vince 2008). CAL facilitation is not focused on developing the person, but on creating and containing the process through which courses of action are developed, and within which personal and inter-personal learning takes place. CAL facilitators have a particular interest in the 'systems psychodynamics' of sets because this perspective addresses dynamics that come both from 'the inside out' (the impact of persons' emotions in the context of prevailing power relations) and from 'the outside in' (the impact of power relations on the person's ability to feel, to act and to learn) (see Petriglieri and Petriglieri 2020).

An assumption at the heart of CAL is that action learning is more than a cognitive endeavor based on the ability of set members to think of provocative questions that inspire reflection and action. CAL takes a particular view of personal, group and organizational dynamics mobilized by people's attempts to learn together. For CAL practitioners, learning always takes place in the context of underlying emotions and embedded power relations. Emotions and power relations both encourage and discourage learning. Vince (2008) has referred to this as both 'learning-in-action' and 'learning inaction', which occur concurrently. Tensions between the desire for learning and defenses against

learning arise because of implicit assumptions and expectations about how things are done in an organization or system. Habits and attachments to established ways of thinking and working are important in organizations because they can ground organizational members in a familiar and supportive culture. But they can also generate a restrictive and oppressive culture, with associated expectations and practices that get in the way of peoples' ability to learn and change.

Practitioners of critical action learning seek to engage with an additional aspect of Revans' action learning formula that combines 'programmed knowledge' with 'questioning insight' (L = P + Q). In CAL, the notion of 'organizing insight' is added (L = P + Q + O) to acknowledge the micro-politics and power relations surrounding the use of action learning. Organizing insight refers to the importance of critical reflection on existing organizational dynamics that influence action learning; and how action learning might replicate and support the maintenance of prevailing relations of power. By this we mean not only the relations of power and influence within the organization, but also how diversity, societal stratification, and assumptions might be replicated across the organization or embedded in the set itself.

> Learning therefore, is a combination of programmed knowledge, questioning insight and organizing insight (L = P + Q + O). Organizing insight is added to suggest that action learning is not only a learning process through which to comprehend individuals' experiences of action (learning from experience) but is also a reflection of existing organizational dynamics created in action (learning from organizing). (Vince 2004, 74)

CAL is a process of learning from, questioning and critically reflecting (with others) on shared assumptions about action whilst also recognizing the role of power and emotion in the learning process (Trehan 2021; Vince 2012). The emphasis of CAL is not only on the empowerment of the individual learner but also on the ways in which learning is supported, avoided, and prevented within sets and in organizations through relations of power. CAL invites set facilitators and members to be aware of the power relations they are creating, representing, and enacting (see e.g. Mughal, Gatrell, and Stead 2018). CAL instigates a shift of focus to encourage both individual learning and collective learning within the context of distinctive emotional dynamics and power relations. This means that in addition to supporting people to generate personal and inter-personal learning and change, action learning addresses the broader emotional and political context in which learning is both promoted and prevented, desired and avoided, acknowledged and denied.

All learning groups are subject to unconscious and unspoken emotions (both individual and collective) that create self-limiting structures for the group. Emotions generated in a learning set are seen as more than an expression of individual feelings. Shared, underlying emotions (e.g. anxiety, fear, frustration, envy, shame) structure and influence the extent to which learning is possible. The emphasis in CAL is on emotional dynamics that are generated in the 'here and now' of the group. They often take the form of defenses against emotions such as anxiety or anger. When ignored, unwanted, unacknowledged, or unconscious emotions begin to structure the action learning set's responses. Over time they reduce the set's ability to learn. Attention to the psychodynamics of action learning sets provide the facilitator and the set with insights into the ways in which prevailing expectations, behaviors, and assumptions influence the potential for learning.

Thinking and acting on emotions and power relations in action learning sets has a practical purpose. CAL develops learning sets' capabilities for critical reflection. Critical reflection 'provides language and concepts which help people acknowledge and make sense of feelings they may have long carried, but ignored, for example, over tensions and contradictions they experience' (Rigg and Trehan 2004, 162). Critical reflection has been defined in two intersecting ways (Fook 2015). First, it refers to the 'ability to unearth, examine and change deeply held or fundamental assumptions, and second that 'what makes reflection critical is the focus on power' (Fook 2015, 441). Both definitions rely on the examination of assumptions and an awareness of how power operates within a specific context. Critical reflection improves peoples' ability to work with unconscious and underlying processes that affect group and individual learning. It provides a basis for engaging with assumptions, expectations and practices in an organization or system that are resistant to learning and change (Vince et al. 2018).

The underlying principles that guide CAL facilitation include belief in equality, diversity and inclusion (EDI) as assumptions that can inform and promote organizing insight. Such ethical considerations ask facilitators to recognize that emotions, politics, and power relations are always embedded in the design, process and practice of action learning. We understand ethics in the context of organizations as 'an affective, relational and embodied response to the needs of others. Such ethics motivates political engagement in resistance to oppression and domination meted out by organizational authority' (Rhodes 2023, 497). The 'critical' in CAL is informed by the search for equality, diversity and inclusion because attempts to implement these moral principles generate personal and organizational contradictions concerning learning. For example, critical reflection unsettles prevailing power relations and in doing so, mobilizes prevailing power relations against reflection (Vince et al. 2018). Ethical considerations relating to EDI inform facilitators' desire to unsettle established ways of working, being and learning. Facilitation in CAL emphasizes the ongoing effort to improve EDI as well as the moral imperative to implement it.

Why is facilitation an important component of CAL?

Action learning is generally seen as a facilitation light process. A core premise of Revans' principles of action learning is that participants themselves have the expertise to reach solutions. Revans was wary of action learning groups becoming dependent on facilitators, feeling that their presence could hinder a group's growth (Revans 1998). Traditionally, set members have the autonomy and authority to develop ongoing cycles of reflection and action to review their own practice over time within a group of peers. However, because CAL seeks to draw out underlying emotions and power relations, facilitation is required to help create an environment where this becomes possible. CAL facilitation is not only concerned with supporting the learner in challenging or changing discourse. It is also concerned with the capacity to illuminate the ways in which participants resist or reinforce power relations. Inherent in the design of CAL (and its facilitation) are structures that ensure a collective responsibility for attending to the *process* of the group. Facilitation involves reviewing organizing insight to modify established procedures and ways of working. Facilitation has a significant role

to play in illuminating the complex dynamics that influence and emerge from collective learning-in-action/ learning inaction within organizations.

There are two reasons why facilitation is important in CAL. First, to provide containment for underlying (at times unconscious) emotional dynamics and processes. Second, to provide a focal point for set members' engagement with emotions and power relations. Containment refers to a facilitator's ability to create and maintain a learning environment that can hold emotions, encourage honest interaction, and support risk (Vince 2016). This does not mean that the set will necessarily feel safe or that set meetings will be comfortable. To begin with, the opposite may feel true because CAL 'is not without some risk for participants, in that dissonance provoked could be excessively disruptive' (Rigg and Trehan 2004, 165). Revans (1998) saw risk as 'imperative' for the success of action learning, and 'without this element of risk, no significant learning is likely to happen' (Pedler 2016, 6). Making a space for risk involves being prepared to work with disruption as part of the process of learning. Good facilitation of learning boundaries (clarity in terms of – time boundaries, the physical space for learning, differences of role, interpersonal responsibilities, and the primary task of the set) means that direct intervention by the facilitator into the flow of participants' learning will be kept to a minimum. Nevertheless, CAL facilitation involves strategic interjections that draw attention to and name dynamics that are being avoided.

Such interjections also allow feelings about the facilitator as a symbol of power in the set to emerge. Projections of emotion onto the facilitator provide insight into the ways in which emotions and power relations are experienced in participants' organizations. For example, feelings about the facilitator can mirror set members' feelings about their managers; and feelings about the set not being safe may reflect lack of safety in participants' organization. Insights from these 'mirroring' relationships between internal and external dynamics offer a realistic basis from which to develop appropriate action in complex and uncertain environments. In summary, the facilitation role in CAL focuses on helping set members: to engage with the emotions and power relations that emerge in the set (both individual and collective); to encourage associations in addition to questions (to surface mixed emotions, emotional connections, and contradictions between members); and to provide a reliable focal point for sets to generate organizing insights through critical reflection. In the following section of the paper, we provide examples to illustrate what this has meant in our practice, and we use these to communicate eight key assumptions that underpin CAL facilitation.

How to facilitate CAL

We present seven examples or 'vignettes' from our practice that illustrate dynamics associated with the facilitation of CAL. The interventions described in the vignettes have developed over twenty years of exploring the dynamics of critical action learning. Our insights emerged over time through trial, error and success. They were informed by our own and others' developments in CAL theory, and through our willingness to remain open to the uniqueness of each context. Each vignette points to issues that are likely to require facilitation, as well as how we interpreted these issues as aspects of the ongoing interplay between reflection and action.

Vignette 1: The connection between personal and organizational problems (learning from experience/ learning from organizing).

A member of a set of student business psychologists asked: 'how can I overcome my insecurity and lack of self-confidence?' In her mind, this was a personal problem that she would like to get rid of. Numerous questions were directed at the symptoms of her insecurity, as well as how she could reduce it. The CAL facilitator seeks ways to support a set's capability to move beyond questions focused on the person (How does your lack of self-confidence manifest itself? What are your exact symptoms?) to include questions focused on the organizing context and power relations within which they arise (What does it have to do with the organization that you feel this way? What is the connection between your self-confidence and your position?)

Questions about the person identified how she felt and behaved. Therefore: 'I get nervous easily, get a shaky voice, avoid eye contact, and tend to speak little. I feel fear, anxiety, and shame because I don't want to fail. I feel anger and rage at myself for not yet being able to consistently appear confident'. Questions about the organizing context identified power relations that kept the person stuck in certain feelings and behaviors. Therefore: 'With family and friends I feel safe and secure, but I find it particularly difficult to appear self-confident when dealing with the boss of my company, because I am intimidated by him as a person – because of his power, his knowledge, his influence and his skills – and consequently I feel insecure'. In addition: 'I sometimes see myself as the bottom link in the chain, although this is not communicated to me in any way from the outside. That's why I don't appear self-confident enough because my colleagues have a higher and more influential position, which I then, so to speak, submit to'.

In this situation, in addition to the identification of an individual problem, restrictive power relations have been co-constructed. A person's feelings of insecurity connect with and reinforce a self-imposed 'organization-in-the-mind' (Hutton, Bazalgette, and Reed 1997), where others are 'higher' than herself. Inaction and ambivalence from colleagues unknowingly compound the problem. It is not clear which comes first. Together, they fail to dispel an imagined or implicit hierarchy (i.e. they make it feel real). In this situation, power relations in the organization remain implicit and an individual internalizes organizational dynamics as a personal problem. These responses are in direct relation to each other, and such dynamics help to structure organizational defenses against emotion. They influence both individual and collective behavior within a learning set (Hauser 2014).

Vignette 2: Associative emotions

A group of pharmacists from different sectors in the UK (hospitals, community-based, commercial) met together in an action learning set over the course of a year. They quickly picked up and worked with the ongoing relationship between reflection in the set and action in the workplace. However, pharmacists are scientifically trained (primarily) and they did not have much experience of reflecting on the impact of emotions and politics at work.

Set members developed questioning insight, and their questions helped each other to reveal underlying emotions associated with work problems. For example, one member who reflected on his experience of action learning said that: 'I had some quite severe frustrations with where I was at in terms of my career and there was also a lot of emotion that was tied up with that. And that quite shocked me because I hadn't realized how deep those emotions ran. I was talking a lot about the fact that my career wasn't going anywhere, that I wasn't prepared to change because of family and because of concerns that I wouldn't be able to cope with taking on additional stress. And I hadn't really appreciated how much pent-up emotion there was all linked in with that' (David).

The other set members were asked to say what they had felt when listening to David speak about his frustrations. Two said they had felt angry listening to David, but neither of them was sure why they felt that way. They were picking up on David's actual feelings (which he acknowledged) and connecting with elements of shared experience of pharmacists' work at this time. There was considerable anger both about changes in their professional practice and in the organizational context of their work.

For the CAL facilitator, it is important to try to bring out the connections between set member's personal reflections on emotions and their relationship to organizing insights

within the work context. This is not always possible only with questions, because questions can repress emotions, make people defensive, and encourage cognitive responses that override emotions. Therefore, to make the link to collective emotions, other set members are asked to make *associations* to what they had heard, rather than asking questions. This involves talking about the associative feelings generated in the other set members (who are listening to David). Instead of focusing on what David feels, the set focuses on feelings generated within them by David's story. The CAL facilitator will not ask a person about their individual feelings ('what are you feeling right now'). Instead, she will invite others to associate with what they have heard, to reflect on the feelings generated in them by the feelings of others. This approach brings out a range of emotions that can both deepen an individual's understanding and promote recognition of shared emotions associated with peoples' collective work. It helps set members to work out how to act on the contradictions and mixed emotions that complex problems generate.

Vignette 3: Critical reflection on the impact of race differences within a learning set.

The members of a newly formed action learning set included: Nirmal, a Sikh man, Wolė, from Nigeria, Dave, a white man, Sally, a white woman, Geoff, a white man, and Mohamoud, a Somali refugee. After four weeks of meeting and just prior to going on a one-week residential course, Mohamoud told the other group members he had to withdraw from the course because he could not finance the course fees. He would not be attending the residential course.

On the residential Sally joined the group, transferring from a different set. Geoff told Sally of the group's history and Mohamoud's probable departure. Geoff said that it was probably just as well that Mohamoud was not here 'because he wasn't a very good communicator. We couldn't understand him very well'. The facilitator asked, 'did the group consider cultural differences?' There was no answer. Sally asked, 'shall we stop for a break now?' There was awkwardness in the room and this suggestion appeared welcomed by most with relief.

After the break Wolė spoke: 'If I don't say something now, I'm not going to be able to work with this group. It's been said that Mohamoud is a poor communicator. You should consider that he speaks six languages, and he does not have a communication problem. If people find it difficult to understand him, it's because they're not being patient. I'd say it's them who have the communication problem. If something like this was said at work, I would almost feel obliged to report it to authority because the behaviour displayed was racist. I've been observing the body language people show to Mohamoud, how people cut him out when he talks, the ways people look impatient when he starts talking, just because he has a way of expressing something that is different from those who speak English as their first language … So, I think the behaviour displayed by the listeners was racist'.

The other group members looked taken aback. Geoff sat back defensively: 'I'm not a racist'. The facilitator intervened. 'Wolė didn't say you were a racist as a person; he said that what you said about Mohamoud's communication can be perceived as racist'. Wolė continued … 'small everyday actions and statements can feel racist even though the person might not mean them to be. Take my name for example, you've been finding it hard to say Wolė, so you've just anglicised it to Wally. But my name is very precious to me'. Following on from this, Dave said to Nirmal: 'I know I've kept calling you the wrong name and you ended up saying, just call me Norman, because that's what they do at your work'. Nirmal responded: 'Yeh, I would rather you called me my proper name. But it's like there's so many little ways that you get put down, you just give up battling on some things. Sally added: 'Do you mean like last night in the bar when you had to wait ages to get served? And then Matt from that other group just walked up and got served straight off?'

For Revans (1982), a guiding assumption behind action learning was the creation of a hierarchy-free space that promotes open interaction and problem solving. Revans described set members as 'comrades in adversity' – people working together across professional and hierarchical boundaries to create learning and change. However, significant differences in sets can be enacted despite a ground rule of freedom from hierarchy. As Mughal, Gatrell, and Stead (2018) observe, an action learning set can readily be a site for the reproduction of social practices. These can be an unconsciously staged mirror of the reality in the organization. For the CAL facilitator it is important to promote critical

reflection on the dynamics that take place in a set and make them integral to the learning process. A guiding assumption in CAL is that hierarchy-free spaces can be illusory. This assumption views differential positions as a potentially positive resource, especially in relation to equality, diversity and inclusion (EDI).

Vignette 4: Developing the impact of EDI as a positive resource in CAL

In 2003 the '12/8' action learning network was created (it was established on 12th August). It consisted of eight African-Caribbean entrepreneurs from across diverse sectors, the Chief Executive of a business support agency, and two researchers. It continues to this day. Each business had developed a niche market and shaped a clientele that connected to their own migrant histories.

The entrepreneurs acknowledged the value of 'difference'. For example, one set member described being able to stand out: 'I think being members of the large business networks is important, especially as that comes with the opportunity to attend events and to be seen, as there aren't that many black people there. So, if we go, people are going to remember us, and that's a good thing. It's like we were in a pink suit!' *[George]*

The entrepreneurs also highlighted the paradoxes involved in difference. On one hand it supports the normalization of diversity and helps to counter negative discourses about minority enterprise. On the other it creates distinctions that can be unnecessary as well as unwanted. For example, a set member spoke of external agencies engaging with ethnic minority businesses. He said, 'While I can see that there is a willingness to engage with minority businesses, I think personally that a business is a business, so it doesn't matter what ethnic origins the business is from [... .] I think that, if they are just going to do business with a business just because they are a minority business, then that's just wrong, I think that you need to do business with whoever can do the job – if they happen to be from a minority then it ticks all your boxes, but I am not sure if they should be engaging with businesses just because they are from a specific ethnic background.' [*Carl*]

At the same time as acknowledging the positive aspects of diversity, the entrepreneurs grappled with inequality and a lack of access to social and economic resources. Over time, through their discussions, the group became more aware of the emotional and political intricacies of leveraging resources and knowledge from policy makers and businesses intermediaries. As one of the set members outlined, 'We don't want to necessarily use our leverage so that Business Link start ticking their boxes but, at the end of the day, if the 12/8 can get a resource by just giving them a few ticks in their boxes, so as long as we get a positive out of it, then we can probably facilitate that,' *(Martin)*

In this example, the CAL facilitator maintains a balance between being sensitive to the distinct problems of minority entrepreneurs, whilst also recognizing such firms want to be seen as part of the mainstream small business population. Facilitation from an awareness of this tension provides an opportunity for set members to reflect on how policy interventions are invariably mediated by social relations of power – between business support agencies, policy makers and business owners. 'So, in terms of us and them having that political understanding – it's good in a way, because it allows people like myself to be in an arena with the big players' *(Martin)*. The action learning group realized over time that diversity and inclusion was an important agenda for business support institutions, which they could exploit by using their own level of power and legitimacy to shape the enterprise and diversity agenda as a positive force for change.

Broadly, the role of the CAL facilitator is to name what is being avoided and ignored in the set. It is not our role to explain or develop it, but to question the avoidance strategies used against learning. The set members must find ways to engage with each other on issues of diversity as part of the process of reflection and action on the work problems they are seeking to address. Set member's avoidance strategies come from the fear that such issues will make them look bad, tear the set apart, or lock them into oppressive positions. In general, the CAL facilitator will act on opportunities to engage with groups dynamics associated with equality, diversity and inclusion. In this way, the facilitator

sustains the set's focus on social power relations that are integral to both defenses against and opportunities for learning.

This is especially true in sets where members imagine everyone to be equal, or that differences don't make a difference. The idea of the implicit equality of a learning set is a fantasy that helps the set to avoid difference. It is a defense against emotion, a response to their fear of conflict. Set members are not only 'comrades in adversity'. They do not only collaborate. They may also simultaneously compete, comply with, and compel others – however pleasantly they work together (Vince 2012). Therefore, for the CAL facilitator, difference is acknowledged not avoided. Working with and through difference aims to free the set from its fears of conflict and help set members to comprehend the role of emotions in the relationship between reflection and action.

We notice time and again that some sets avoid and resist the reflection offered (Hauser 2012a; Rigg, Ellwood, and Anderson 2021). These are the very sets that are subsequently less satisfied with their action learning process. Action learning becomes 'time-consuming', 'lacking direction', 'confusing' or 'just another project … how projects work is nothing new'. The CAL facilitator seeks to understand the message of resistance as symptomatic of blockages in the organization or system. Resistance and avoidance in the learning set is likely to be a mirror of the resistance and avoidance that is embedded in members' organizations. This matters because defense and avoidance contribute to dysfunctional organizing. To develop 'organizing insight' (Vince 2004) we must engage with how organizational dynamics become visible in the set. Some of the questions that facilitation can raise include: What does it have to do with the everyday experience in the organization that set participants act and feel as they do? What emotions do the different situations trigger in participants? What are the power dynamics in the set? How was the process of set building? Are there coalitions of avoidance and enabling? Who are the 'silent voices' and what could they offer for the set?

Vignette 5: *Each person imagined they were the only one to have such experiences.*

Following an employee and customer survey, a set of executives were assigned the task of driving culture change. The expectation of the facilitator was to support the impetus for a modern leadership culture. However, the facilitator started to question from a different focus: 'what oddities do you notice in the leadership culture of your company? Please give very specific examples.' After some time of reflection, a set member related an experience in which he was personally devalued. After a long moment of silence, a second shared an experience that exposed him in front of others. A third told how she was ridiculed in the presence of her colleagues, and that she didn't have the faintest idea what was important (and so on and so on). Each set member shared a story of put-downs and disparagement. Each person had imagined that they were the only one to have such experiences.

The set decided to share what they had discovered with the CEO. The CEO became silent and then said he was having a similar experience of feeling disparaged. The insight from the action learning set was shared with the entire leadership team, and they decided that they would collaborate on the necessary culture change, organizing themselves in sets. Among the many small steps and results that were worked out was the codification of cooperation, which also included how to intervene when someone is devalued. The company consequently practised and improved action over time. Incidents of disparagement decreased significantly.

The CAL facilitator is focused on the possibility that behavior in a set may mirror behavior in the organization or system that set members come from. Therefore, facilitation involves posing questions that probe and name such dynamics. In the above example, organizational members colluded with an underlying process of devaluation and disparagement that became an implicitly accepted element of that organization's behaviors,

structures and culture. The shift in questioning onto current (rather than future) culture opened a space for shared recognition and change.

Vignette 6: *What is disturbing about our culture that needs to be changed?*

A successful high-tech company had developed from a research institution to a market-oriented provider of special solutions. Triggered by extensive feedback rounds of the management with numerous employees, the Managing Director (MD) noted that there was often a lack of 'hands-on commitment', and a reluctance to take responsibility. A tendency had developed in the organization to quickly see things very critically and to question them through scepticism, doubt, and rejection. This had a paralyzing effect. The MD posed the question: 'what is the ideal organizational culture for us?'

The CAL facilitator is interested in how aspects that have been hidden and resisted in the past (consciously and unconsciously) get in the way of future change. The question about what future culture would be best for the organization therefore requires reframing to access persistent organizational dynamics that are embedded in prevailing culture. Therefore, the question was no longer 'what is the ideal organizational culture for us?' but 'what is disturbing about our culture and therefore urgently needs to be changed?' The intervention opened the door to very personal, emotional expressions about current experiences in the organization. It also showed organizational members habits and attachments to unproductive ways of working that had become taken for granted. For example, 'we do not even notice that our automatic actions are contrary to our insights and beliefs'.

This example raises the question of what conditions generate or reproduce a lack of engagement with taken-for-granted aspects to organizations. Vince (2008) points out that joint learning does not always have to release creative forces but can also lead to joint avoidance of action under the influence of micro-politics. This draws attention to the automated, collective habits of thought and action that have become unquestioned components of peoples' lived experience of organizations (Hauser 2012b, 2014). For the CAL facilitator it is important to help the set to identify habits of thought and action, taken-for-granted patterns, and unquestioned behaviors and expectations. Support for sustained critical reflection is what makes this possible.

Vignette 7: *SAGA, a model for addressing micro-political conflicts in CAL.*

There is a lot of tension in a management team. The head of sales attacks the much younger head of technology in a meeting, saying that he is a theoretician who does not know the practice. The head of technology regards the sales manager as an irritable person with authoritarian 'old school' behavior. Each blames the other for why the results are so poor that there was growing attention from the managing director and the board. From the facilitator, the head of technology wants to know if he can guarantee that the set work will be successful. The facilitator emphasizes that the responsibility to change something lies solely with the participants. If they are willing, he sees a good chance for success, but there is no guarantee. The facilitator uses the SAGA dimensions to work on the common problem. SAGA is an acronym for 4 dimensions of questioning to work on common problems of a set. S stands for situation or facts, A1 for assumptions, presumptions, hypotheses, G for gut feelings and emotions A2 for impulses for action or actions. With the facts collected in a joint effort, to the astonishment of the participants, a picture quickly emerges that is accepted by all.

In a next step, the facilitator encourages the participants to openly disclose their assumptions why the cooperation is not working, and the feelings triggered. This phase requires mindful guidance and intervention by the facilitator to create a safe space where the risk of openness is possible. The process of expressing oneself and listening attentively created a deep consternation that changed the atmosphere in the room. Afterwards, impulses for action were collected to decide on actions. The head of sales suggested developing the circle into a 'top team'. The others take this up and together they work out the necessary measures. In the further meetings, the atmosphere became more and more open and constructive, and the team assumed its joint leadership task for the whole and developed ways to support each other in the pursuit of the goals and to defuse conflicts in the process. The senior management team saw how tensions between their work teams decreased and a significantly improved economic result was achieved. In this phase, the facilitator's task was to pay attention to and support the team in maintaining a safe space to openly deal with irritations and misunderstandings, and to strengthen the competence of the participants to do this themselves.

We think that the situation we describe above is a common pattern, and that CAL is a good choice in such cases. CAL is an effective developmental approach for working on the underlying causes of tensions in organizations. External pressures on an organization often stimulate internal power dynamics and micro-politics, which are a focal point for CAL. The approach supports trust and collaboration in the context of complex and diverse power dynamics, as well as the anxieties and defenses they produce. This focus means that it can have a significant role in change projects. CAL offers an effective tool for improving relationships and shared responsibility for change within an organization, especially when it involves the main actors associated with these power dynamics.

A practice guide for CAL facilitators

In the previous section of the paper, we provided seven examples. We have reviewed our vignettes and reflected together on our shared experience of doing critical action learning. In Table 1, we summarize what we consider to be eight key components of a practice guide for CAL facilitators. These points address what makes facilitation important in CAL and provides broad guidance on how these are put into practice.

The eight components of our practice guide imply a range of CAL facilitator capabilities. We are cautious about lists of capabilities because they change over time and tend not to be consistent across different contexts. However, we think it useful to provide reflections on some of the qualities we think are associated with facilitating CAL. It takes a certain confidence to contain and publicly reflect on interpersonal and systemic complexity. Because of this, CAL facilitators must be committed to working with and through uncertainty, anxiety, and discomfort – both our own and others. Our confidence in this work is sustained in practice through our ability to be emotionally connected to behavior in the set, to pay attention to group dynamics, to encourage interaction on differences in the set, and to resist our own impulses to control. We also see the value of unpredictability in action learning.

As we have already said in our introduction, CAL takes a particular view of personal, group and organizational dynamics mobilized by people's attempts to learn together. Learning takes place in the context of underlying emotions and embedded power relations. Therefore, our emotions in the role of facilitator are central to our practice. There are two elements to this. First, we must be willing to work positively with projected emotions. It is common for facilitators to be the recipient of action learning set members' anger or other projected emotions, as well as to observe within the sets a range of emotional responses such as withdrawal, silence, aggression, and scapegoating. CAL facilitators develop resilience in the face of set members' emotions as well as the confidence to interpret them and pose insightful questions that promote organizing insight. Second, we must be willing to work positively with our own emotions in the 'here and now' of the set. This means not being afraid or hesitant to use what we hear, feel and sense in the service of insightful questions.

Facilitator anxiety is an integral and inevitable part of the potential for both participant's and facilitator's learning in CAL. Anxiety arises because the CAL facilitator seeks to recognize, surface and actively engage with social, emotional, and political processes associated with facilitation (rather than attempting to manage them or to avoid them). The CAL facilitator engages with defenses against emotion and with conflicts that arise

Table 1. A practice guide for CAL facilitators.

Connecting 'questioning knowledge' and 'organizing insight'	The CAL facilitator pays attention to the ways in which the personal and the organizational are connected in action learning sets. Individuals can unknowingly internalize organizational issues as personal problems. Established organizational structures and practices can unwittingly limit individual learning. The CAL facilitator holds personal and organizational dynamics in direct relation to each other to reveal how this interconnection helps to generate organizing insight.
Working with associative emotions	The CAL facilitator will not ask a person about her or his individual feelings ('what are you feeling'). Instead, the CAL facilitator will invite the other set members to associate with what they have heard, to reflect on the feelings generated in them by other people's emotions. This connects individuals to their emotional experience in the 'here and now' of the set and promotes recognition of shared emotions associated with peoples' collective work.
Questioning what is taken-for-granted by promoting critical reflection	It is important for the CAL facilitator to encourage set members to identify taken-for-granted expectations and unquestioned behaviors. Support for sustained critical reflection is what makes this possible. The CAL facilitator promotes critical reflection on the dynamics that take place in a set and makes them integral to the learning process. A guiding assumption in CAL is that power relations are an integral part of attempts to learn in sets. There will be implicit and explicit hierarchies and differences in a set, imagined and imposed both from outside and within.
Working with and through difference	For the CAL facilitator, difference is acknowledged not avoided. Working with and through difference aims to free the set from its fears of conflict and help set members to comprehend the role of emotions in the relationship between reflection and action.
Naming what is being avoided, hidden, and resisted in the set	The role of the CAL facilitator is to name what is being avoided or ignored in the set. She or he will not explain or develop what is happening, but rather find ways to question the avoidance strategies used against learning. The CAL facilitator is interested in how aspects that have been hidden and resisted in the past (consciously and unconsciously) get in the way of future learning and change.
Working with embedded social power relations	The CAL facilitator acts on opportunities to engage with interpersonal and group dynamics associated with equality, diversity, and inclusion. In this way, the facilitator sustains the set's focus on social power relations that are integral to both defenses against learning and opportunities for learning.
Working with behavior in the set as a mirror of behavior in organizations	The CAL facilitator focuses on the group dynamics of the set. Behavior in a set often mirrors behavior in the organization or system that set members come from. For example, resistance in the set can be symptomatic of blockages in the organization or system.
Providing containment for engagement with emotions and power relations	The role of the CAL facilitator is both to emphasize that the responsibility for change lies with participants, and to offer a framework for learning that provides effective emotional containment for their efforts. Effective containment creates opportunities for participants to question established assumptions and to engage with the emotions that are triggered by them. It strengthens the capability of set members to make changes happen. The SAGA approach is one model of this (Hauser 2012b; Hauser, Lanz, and Radl 2020). Other critical models include the integration of systems psychodynamics and action learning (Trehan 2021; Vince 2016); and mindfulness and action learning (Rigg 2018).

in the learning set, especially around difference. It is also important to reflect on our own biases, needs and comprehension of context as a way of understanding personal, group and organizational dynamics that both promote and prevent learning.

As facilitators, our own unease or anxiety can unsettle us in ways that help us to understand what's going on in a set. Facilitator anxiety is data, offering either potential self-

insight for the facilitator, and/or provoking us to consider what such unease might be subconsciously telling us about the process. For example, one way to use anxiety as data on the ongoing learning process is to recognize the difference between emotion generated in the 'here and now' of the group (emotional responses that represent what is going on in the system) and emotions that appear to be habitual, learned or automatic (responses that stem from personal histories or from embedded organizational roles, rules or expectations). This means being careful not to react against or to ignore emotions like anxiety or anger when they surface in a set. It is important to carefully reflect on one's own emotions in the role of facilitator, and to question them for their meaning in and understanding of a given situation. The generation of organizing insight requires sensitivity to anxieties and other emotions that underpin and guide our interventions.

Just as we must pay attention to emotions, we must also be attuned to two aspects of power in action learning sets. First, there is always a relational, social and political context within which action learning is being attempted (Vince 2012). These various, inter-related dynamics point the way to both overt and covert power relations that shape people's willingness and ability to learn. Second, there are broader dynamics associated with organizational and cultural politics of reflection and action. Our guiding idea is always to 'notice what we are noticing'. This involves listening to silent voices, noticing imbalances, and addressing inequalities in the set in an appreciative way. It means taking the risk to engage with what remains unsaid, to have the patience to let interventions work, and to offer trust to the set in its autonomy. In our experience, CAL is a powerful approach that will make a difference to the depth of insight that set members generate, as well as the impact and sustainability of change that is possible from set member's actions.

Conclusion

The facilitation role in CAL focuses on helping set members to engage with the emotions and power relations that emerge in a set; to encourage associations with emotions in addition to questions; and to provide containment so that sets can generate organizing insights through critical reflection. The emphasis of CAL is not only on the empowerment of the individual learner but also on the ways in which learning is supported, avoided, and prevented within sets and in organizations through defenses against emotion and through established relations of power. Practitioners of critical action learning seek to engage with 'organizing insight'. This is achieved through critical reflection on emotional and relational dynamics that influence action learning; and on how action learning might replicate and support the maintenance of prevailing relations of power. This means that, in addition to supporting people to generate personal and inter-personal learning and change, action learning will engage with the emotional and political context in which learning is both promoted and prevented. Thinking and acting on emotions and power relations in action learning sets has a practical purpose. CAL develops learning set capabilities for critical reflection, which provides a powerful tool for learning and change in organizations.

We end this paper with two open questions for scholars and practitioners who want to work from a critical action learning perspective. First, what new ideas and ways of working can be developed to improve the impact of CAL? Although we have provided a practice

guide and thoughts about the capability of facilitators, we also know that CAL facilitation is learned in practice. Cultivating its craft is an ongoing endeavor based on persons' lived experience and critical reflection on that experience. Increased interest in using CAL will help action learning scholars and practitioners to understand both developments in theory and further questions about implementation. For example, increased utilization of CAL will shine a light on whether there are identifiable contexts where CAL is difficult to implement, and how amenable CAL is to different personal and inter-personal approaches to learning. Increased interest in CAL can provide our community with more insights about how CAL facilitators develop their craft, as well as the resources we draw on. There are also questions that arise from the focus within CAL on emotions, for example, how do CAL facilitators use their body in facilitation; and how do we develop our ability to identify unconscious dynamics at play in the context of attempts to learn? Second, how can we use critical action learning to help organizations and society engage with the considerable challenges that face us? These include (but are not limited to): a lack of leadership diversity, contemporary social movements (e.g. 'black lives' and 'me too'), increased inequalities and divisions in society, the ongoing consequences of Covid and its successors, and the pressing work problems experienced by so many organizations. Our view and experience is that critical action learning is a powerful tool for engaging with pressing social and organizational problems, both today and in the future.

Acknowledgements

Disclosure statement

Notes on contributors

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