2011-2012 Luoma Leadership Academy
Action Learning Project Executive Sponsors

Executive Sponsors provide a critical role in advising and supporting an action learning team. To understand the action learning approach used by teams, you may want to read the action learning resource materials attached. Included in this document are:

1) Background (Purpose of Action Learning Projects)

2) Role of the Executive Sponsor and Tips from Previous Sponsors

3) Expectations for Action Learning Teams

4) Overview of Action Learning Resources for Teams

Background

Action Learning Projects are designed to help Luoma Leadership Academy participants apply the leadership skills they learn during the first week's session. Teams (comprised of 5 to 6 participants) work on projects that benefit a college, university, or the entire system. Action learning projects address a problem or thoroughly research an issue. Projects are intended to facilitate the following:

Build System Leaders

1) Increase participants' skills in becoming SYSTEM leaders by exposing them to projects beyond their own institution that will benefit the enterprise.

2) Give participants opportunities to learn how to communicate effectively across the system using a variety of methods, including conference calls, ITV meetings, Webex, as well as in-person meetings

3) Expose participants to the challenges of working with cross-functional teams and to develop collaborative relationships across the system

4) Give participants opportunities to interact with other leaders in the system (Executive Sponsors and team advisors)

Facilitate Learning

The primary purpose of the team-based action learning project is: What have we learned?; not just "what have we accomplished?"

> Teams are encouraged to reflect on what they're learning during each meeting in order to improve their process and their project
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> The focus is more on "are we asking the right questions?", rather than focusing solely on "the solution."

Role of Executive Sponsors
Executive Sponsors are responsible for the following:

1) Meeting periodically with the action learning team; minimally twice: once at the beginning of the project and once at the end of the project to receive the team report. (Best practice has demonstrated that 3-4 meetings spaced over the year are optimal.) Executive Sponsors may certainly be more involved with the team, but the actual work should be led and completed by Leadership Academy participants. *(Optimally, executive sponsors will arrange their first meet with their action learning team during the week of July 17, 2011, at the Oak Ridge Conference Center in Chaska.)*

2) Serve as a resource to remove obstacles when needed or suggest resources for the team.

3) Facilitate sharing of the team's work when completed as appropriate.

Tips from Past Executive Sponsors
1) Familiarize yourself with action learning principles and the role of the *action learning coach* (who focuses solely on the team's learning) *see attached materials*

2) In the first meeting with your team, focus on clarifying the project goal or objective with the team. They will be asking a lot of questions early in the process to clarify the project and possibly narrow it or reframe it with you. (The goal in the first meeting and in the first month or so is to identify a project goal that is realistic and achievable for the team with a strong benefit for you.)

3) In the first meeting with your team, identify the team's action learning coach, who will be your main contact and liaison with the team. If you have multiple sponsors and advisors, decide who is the main point of contact for your action learning coach and determine how you will communicate.

4) Opt for quarterly check-ins with your action learning team, if at all possible. This allows for course correction if the team begins veering off the intended goal of the project.

5) Clarify any important protocol with your team about next steps after the project is completed or who else the project results should be shared with.

Action Learning Project Expectations and Resources for Teams

Task Expectations
1. Meet with your Executive Sponsor/team advisors within during the Luoma Leadership Academy summer session 2011.
2. Plan to spend a minimum of at least 16 hours per month working on your project (this includes meeting times and your own research/development time).
3. Complete project and hold a meeting with your executive sponsor before July 2012.
4. Complete a project report and executive summary and submit it by July 10, 2012 to your Executive Sponsors; send a copy to Anita Rios at anita.rios@so.mnscu.edu for posting on the Web.
5. Report on your team project during the Leadership Academy summer session 2012, relating solution(s) to the problem and the team's learning.

Process Expectations
6. Use action learning principles in team meetings
7. Set group norms/ground rules
8. Rotate the facilitator role on your team.
9. Appoint **one** action learning coach on your team. This person will be the coach for your team, helping you to reflect on your learning. The coach will not be involved in the project tasks, but will responsible for setting up meetings and serving as the liaison and the primary contact for your action learning project to your executive sponsor(s) and team advisor(s). The action learning coach will need to attend an extra development session to practice reflective inquiry skills during August 2011.

Resources
1. Your Team Members
2. Executive Sponsor and Team Advisor(s)
3. Action Learning Liaison (Anita Rios)
4. Other subject matter experts

ACTION LEARNING PROJECT
RESOURCE MATERIALS

Overview

Action learning is a powerful problem-solving tool that has the capacity to simultaneously build successful leaders, teams, and organizations. When action learning principles are used, teams can create powerful, breakthrough solutions for organizations. In action learning, the learning of the team is valued as much as the solution the team develops.

Action learning focuses on questions first, rather than solutions. Questions can help:

- Gain a common understanding of the problem
- Gain a sense of potential strategies
- Achieve innovative, breakthrough solutions

These questions promote greater dialogue and a balance between advocacy and inquiry that help teams uncover the best solutions to problems, not the quickest or easiest. Action learning helps a group diverge, through the use of inquiry, before narrowing and converging onto a single solution. It also provides a wide helicopter view of the problem by considering dumb or "fresh" questions.

The power of Action Learning is based on two key behaviors:

1) Reflective Inquiry
2) Continuous Learning

Reference: Marquardt, Michael J. (2004) *Optimizing the Power of Action Learning: Solving Problems and Building Leaders in Real Time*. Mountain View, CA.: Davies-Black Publishing.

The Stages of Action Learning

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Formation of Group – The group may be appointed or made up of volunteers and may be working on a single organizational problem or each other's individual problems. The group will continue for a predetermined amount of time and number of sessions, or it may determine these at the first meeting.

Presentation of problem or task to group. The problem is briefly presented to the group. Members ask questions to gather more information about the problem or task.

Reframing the problem. After a series of questions, the group, often with the guidance of the action learning coach, will reach a consensus as to the most critical and important problem that the group should work on and will establish the crux of the problem, which may differ from the original presenting problem.

Determining goals. Once the key problem or issue has been identified, the group searches for the goal, the achievement of which would solve the reframed problem for the long term with positive rather than negative consequences for the individual, team, or organization.

Developing action strategies. Much of the time and energy of the group will be spent on identifying and pilot testing possible action strategies. As in the preceding stages of action learning, strategies are developed via the reflective inquiry and dialogue mode.

Taking action. Between action learning sessions, the group as a whole, as well as individual members, collects information, identifies status of support, and implements the strategies developed and agreed to by the group.

Capturing learnings. Throughout and at any point during the session, the action learning coach may intervene to ask the group members questions that will enable them to reflect on their performance and to find ways to improve their functioning as a group.

Marquardt, p. 12-13

Ground Rules that Empower Action Learning

1) Statements Should be Made Only in Response to Questions
   Moves team members from advocacy to inquiry
   From making statements and judgments to listening and reflecting

2) Action Learning Coach has the power to Intervene
   The action learning coach does not work on the problem, but focuses on the learning of the group.

   Other Important Ground Rules:
   1) Confidentiality
   2) All team members must attend each meeting
   3) Others that the team develops

Characteristics of Effective Action Learning Groups

1) Shared Commitment to Solving the Problem
2) Clear, Common Purpose
3) Willingness to Work with Others to Develop Strategies
4) Courage to Question Others
5) Clear and Accepted Norms
6) Respect and Support for Others
7) Willingness to Learn and to Help Others Learn
8) Cohesiveness and Trust

Guide for Forming Questions and Reflection

- Are we using open, reflective, and probing questions?
- Are they fresh, clarifying, timely, and supportive?
- Do we avoid closed, multiple, and leading questions?
- Is everyone involved in the questioning?
- Do we provide sufficient time between questions?
- Did we jump to solutions before framing the problem via questions?
- Are we questioning to solve the problem or to impress?
- Is there reflective time between questions and comments?
- Is listening attentive and open, or is it evaluative and inattentive?
- Are we filtering out what the person is saying?
- Do we listen without interruption?
- Are we viewing each other as learning resources?

What Makes a Good Question?

- Causes us to focus and/or to stretch
- Create deep reflection
- Challenge taken-for-granted assumptions that prevent us from acting in new and forceful ways
- Are difficult to answer and may take courage to ask
- Lead to breakthrough thinking
- Contain the keys that open the door to great solutions
- Are fresh questions raised in "conditions of ignorance, risk, confusion, or when nobody knows what to do next" (Reg Revans)
- Are supportive, insightful, and challenging
- Are unpresumptuous and offered in a sharing spirit
- Are selfless, not asked to illustrate the cleverness of the questioner or to generate information or an interesting response for the questioner
- Open up the problem owner's view of the situation
- Open doors in the mind and get people to think more deeply
- Test assumptions and cause people to explore why and how they act
- Generate action

Examples of Good Questions:

- Can that be done in any other way?
- What other options can we think of?
- What resources have we never used?
- What do we expect to happen if we do that?
- What would happen if you did nothing at all?
- What other options do you have?
- What is stopping us?
- What happens if….?
- Have we ever thought of…?

Types of Questions in Action Learning

Open questions give the person or group a high degree of freedom in deciding how to respond; for example, "What would be the best results if we took that action?"

Affective questions invite members to share feelings about an issue: "How do you feel about leaving this job?"

Reflective questions encourage more elaboration; for example, "You said there are difficulties with your manager; what do you think causes these difficulties?"

Probing questions cause the person or group to go into more depth or breath on a topic: "Why is this happening?"

Fresh questions challenge basic assumptions; for example, "Why must it be that way?" "Has this ever been tried?"

Questions that create connections help create a systems perspective; for example, "What are the consequences of these actions?"

Clarifying questions result in further descriptions and explanations, such as "Are you saying that….?" "Could you explain more about this situation?"

Explorative questions open up new avenues and insights and lead to new explorations: "Have you explored/thought of ….?" "Would such a source help?"

Analytical questions examine causes and not just symptoms:
for example, "Why has this happened?"

Closed questions can be answered by "yes" or "no," or a quantitative response can be useful to clarify or seek further understanding and quickly move the group forward; for example, "How many people will be affected?" "Did you agree with this decision?"

Types of questions that are not helpful in action learning are *leading questions* that force or encourage a person or group to respond in the way intended by the questioner and *multiple questions*, a string of questions put together to meet the needs of the questioner, but confusing to the responder.

Checklist for Problem Reframing, Goal Formulation, Strategy Development, and Action Taking

Problem Reframing
- What is the quality of the problem solving
- Has the problem been reframed?
- Did we ask fresh questions?
- Is the presenting problem the real problem or only a symptom of the problem?
- What is the level of commitment to solving the problem?

Goal Formulation
- Will achieving this goal or objective solve the real problem?
- Will this goal keep the problem solved?
- What is the leverage gained and impact achieved by this goal?
- Will the goal stretch the individual, team, and/or organization?
- Does the goal complement and support other goals of the organization?

Strategy Development
- Have the obstacles been identified?
- Are we committed to innovative, high-quality solutions and strategies rather than quick solutions?
- Have we tapped the sources of power, passion, and knowledge?
- Have outside resources and links that may be needed been identified?
- Have the impact and consequences of the strategies been carefully considered?
- Is this the best-leveraged solution?

Action Taking
- Are actions to be taken as a part of each meeting?
- Are the actions clear as to who, what, and when?
- Are they recorded and then reviewed at the next meeting?
- Have we gained any learnings from actions taken?
- Are strategies being implemented?

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Marquardt, p. 107

Preparing for the Action Learning Coach Role

- ■ Focus on learning of the group
- ■ Do not work on the problem during the meeting
- ■ Ask questions only

Reserve 15 minutes at the end of each meeting for questions to reflect on the learning process of the group. The coach will need to signal the group when they are nearing the last 15 minutes of the meting.

If needed, during the meeting, an action learning coach should intervene with questions that will help move the group forward.

Interventions should last no more than 5-10 minutes, so that the group can return to working on the problem. Some interventions may last only a minute. (e.g., "Jim, what do you think is the impact of your question/statement on the group?")

Questions commonly asked by Action Learning Coaches

- How are we doing as a team—okay or not okay?
- What are we doing well? Can you give an example of what we have done well? What was the impact of that?
- What could we do better? Can you be specific?
- Do we have clarity and agreement on the problem? (Ask everyone to write it down."
- What is the quality of our questions?
- Are we building on each other's questions and ideas? Examples?
- What is the balance between questions and statements?
- What is the group attempting to accomplish?
- Could you turn that into a question?
- How creative have we been? How could we be more creative?
- (To the problem presenter) What questions have been the most helpful?
- What is the quality of our ideas? Our strategies?
- Any learnings thus far about the problem content? Leadership? Teams?

Preparing for the final group meeting:
The action learning coach's role during the last meeting is more prominent in capturing the group's learning. This intervention may last from 30 minutes to two hours.

For questions about action learning, contact:

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