

Submission Template for the 2016 OBTC Teaching Conference for Management Educators

1) Title, Abstract & Keywords:

Action Learning and the Changing Practice of Management

The presenter will make the case for **action learning** as the most promising learning method to prepare individuals for the changing **practice of management**. The reason is that management today is less frequently produced from a single individual; rather, it has become a dynamic **collective practice** that is distributed across workers and managers. Compared to traditional classroom learning often delivered in off-site settings, action learning summons participants to live engagements and **reflection** on their experience so as to expand and create knowledge while at the same time trying to improve practice. The session will feature a short case and ample dialogue.

2) Teaching Implications:

This session purports to make some important contributions to both management pedagogy and management practice. Its pedagogical contribution hinges on the value of action learning as a uniquely alternative format to prepare participants for the messy world of management. Rather than focus on the learning of competencies, it is concerned with metacompetences that transcend the application of immediate skills in order to adapt to variability in work demands. What this entails is a shift to unique learning processes associated with second- and third-order learning that seek to uncover the underlying assumptions and presuppositions, respectively, guiding current practices. Faced with unpredictable circumstances, participants rely on reflection-in-action and incorporate activities such as on-the-spot reframing, reevaluation of standard practices, and spontaneous testing of available knowledge to arrive at a solution to the immediate problem. Their learning arises not from prepared scenarios controlled by classroom instructors but from working through the messy, implicit, and real questions of practice.

In the domain of management practice, the session relies less on management and leadership as stable entities but rather refers to a more emergent dynamic, one that suggests perpetual unfolding and meaning making. The practice approach depicts collective action emerging from mutual, material, discursive, sometimes recurring, and sometimes evolving patterns in the moment and over time among those engaged. Hence, it alters our traditional views of management and leadership because it relies not on the attributes of individuals nor does it focus on the dyadic relationship between leaders and followers, which historically has been the starting point for any discussion particularly of leadership.

The learning objectives of this session, then, are:

1. To review the strategic elements of action learning and entertain how they can contribute to a practice-based management.
2. To compare action learning to traditional classroom education.
3. To compare and consider the coupling of management and leadership.
4. To learn the foundations of the practice approach to management/leadership and compare them to traditional approaches.
5. To witness and participate in some applications of practice-based action learning to leadership development.

3) Session Description and Plan:

The session will start with my presenting an advocacy position regarding the link between action learning and the practice approach to management/ leadership. In fact, I hope to demonstrate that the link can be causal because each is associated with lived experience that occurs within specific historical, cultural, and local contexts. In the case of action learning, knowledge is viewed as arising from a contested interaction among a community of inquirers rather than from a single source of expertise. In the case of leadership as a practice, leadership is viewed less frequently as an influence relationship originating from a single individual; it occurs more often as a dynamic practice that is distributed across a range of individuals. In both instances, agency occurs as a learning that typically involves a change in trajectory through semiotic, often dialogical, exchange among those engaged in the practice.

Because the perspective of both learning and management practice as collective activities are likely to be viewed with some degree of surprise and perhaps suspicion, I believe we will need some 45 minutes to have me present my views and concurrently engage the audience in a full conversation about my critical commentary. Thereafter, I plan to turn to issues regarding leadership development from a practice perspective. In particular, leadership development will require an acute immersion into the practices that are embedded within social relations and between people, objects, and their institutions. Applying action learning in particular, learners appreciate the habits, attitudes, and skills that give rise to a point of view of management or leadership as a collective process that extends beyond the individual. For example, in the both the project and learning team features of action learning, team members begin to make use of the team's resources and recognize the contributions of others – for example, who provides support to team members in need, who fosters team spirit, who knows where to find answers to the most intractable of problems, who explores and reports on opportunities outside the team. These issues are not lodged within any one person; they become the knowledge responsibilities of the entire team.

After the 45-minute conversation, we will break into tables (approx. 7-10 participants per table) to examine a short case called: "The Case of Karen: Reporting Her to the VP" (please see Appendix A). It features a new supervisor named Karen who, after taking over from an autocratic predecessor, attempts to introduce shared leadership into her team. Although initially excited, the team soon starts to resent some of their new responsibilities and

“reports her” to management. Eventually she is fired for not adopting the organization’s managerial competencies.

Each table will work through their reactions to the case and, in particular, if Karen could have been “saved” and under what conditions. After 15 minutes, I will pass out an action learning practice perspective on the case – drawn from my prior presentation (please see Appendix B). Table participants will then engage in a second 15-minute dialogue to react to this practice perspective.

In the final fifteen minutes of the session, we will hold a full plenary conversation on challenges, learning, and insights drawn from the table dialogues, tying them back to our initial conversation.

4) Application to Conference Theme:

Although the national political landscape may suggest a return to an individualistic culture based on self-interest, the surge toward collective and collaborative practice seems inevitable, especially in a connected world featuring a networked economy. The currents in our political economy are not only changing, they are in veritable disarray. But if the move toward collective practice is inevitable – lest our very survival becomes at risk – we need to create change across our institutions, such as in our schools and businesses. Consequently, we will need to challenge our educational delivery system from being teacher-centric to becoming practice-centric. Correspondingly, we will need to challenge our management behavior from being authority-based to becoming practice-based. Action learning as a collective practice based on dialogue has not gained a solid foothold in the U.S. Perhaps this session will revitalize its contribution as a means to unleash a changing – and more democratic – management practice.

5) Unique Contribution to OBTC:

I have never presented this work before nor is it under review elsewhere, although the session would be loosely based on an article in the new *Management Teaching Review*, sponsored by the OBTS Teaching Society for Management Educators. However, it is entirely different to present and attempt to engage a potentially interested audience in the topic in question, rather than have it read in a journal. The ideas become actionable and are subjected to more challenge and insight, with the further benefit of immediate feedback to the presenter. This will also be the first time that I will have the opportunity to craft and test out the short case that I will be using in the session. Finally, I think it holds immediate interest to the OBTC’s emerging agenda in management education and practice.

The Case of Karen: Reporting Her to the VP

This case takes place in an operations unit within a large urban health center. Unit staff were miserable working under the thumb of an imperial supervisor. The tide was about to turn, however, because there was news of this supervisor's impending retirement as well as her replacement by a much "kinder and gentler" supervisor. As it turns out, the original supervisor was indeed replaced and staff were excited by the new supervisor—let's call her Karen—because she was interested in sharing leadership. They enjoyed the new approach, but it didn't last long. In due course, the staff began to resent having to take on managerial responsibilities because they felt it was the supervisor's job. Many of them "reported" her to management. The vice president (VP) of operations intervened and decided to give her another chance to implement the core competencies endorsed by the center's Middle Management Development Program, which Karen had taken. Among the competencies were to establish a firm vision, sustain commitment to the vision, and align staff to the vision. Karen didn't change her management approach very much during the trial period because she insisted that it was important to get everyone involved in the visioning process while spreading unit responsibilities to all the staff. Ultimately, the VP had to let Karen go. In his notes subsequent to her release, he wrote that Karen was not a credible leader because she did not know how to take control and run the unit as any good manager should. She did not have the necessary competencies of an effective leader.

Question: Could Karen have been "saved?"
If so, how?

An Action Learning Practice Perspective on the Karen Case

Before presenting a practice view of this scenario, I wonder how many of you felt that there was a mishandling of the competency model advocated by this health center's management development program. Perhaps in teaching the necessary competencies, there should have been more attention to how to implement them. For example, maybe using a case or some experiential activities, Karen could have been taught how to get her staff to buy in to the competencies, such as committing to a vision. Placing her in her unit without the necessary practice in competencies may have been asking too much of her.

However, in presenting the practice approach, might we start by suggesting that there might be a degree of futility in teaching skills and competencies detached from the very dynamic processes in which a manager may be currently engaged? Might any "best practice" competency approach come across as out-of-touch if detached from experiences on the ground?

In contrast, the practice approach privileges unfolding relations and processes. It places participants in leadership development into the very throes of their everyday lived experiences rather than in classrooms. Let's pick up the case when Karen arrives but rather than having her take the training course, let's enlist her in an action learning program with other middle managers. The program would enroll middle managers who are asked to bring up particular problems in their practice for mutual sharing, reflection, and in some cases, for "just-in-time" short training. Each participant also has the services of a coach to work with him or her on individual development. Karen presents to her learning team her interest in sharing leadership, while acknowledging that her staff have operated under an autocratic supervisor for some 15 years prior to her arrival. She receives nearly unanimous feedback from her learning teammates as well as from her coach that although she has a very credible idea, she will need to determine how to help her staff make a steady transition to a more collective management practice. She had not realized how long it may take for people (esp. those exposed to autocratic supervision) to develop both an appreciation for and an ability to adopt participative methods. Through both individual and peer coaching, she learns that she needs to be gradual in her approach, initially taking small steps (e.g., engaging her staff in effective two-way communication, dialogue, and reflection; allowing them to self-correct after making mistakes; giving them a chance to try out some self- and team-management practices).