Central Lancashire Online Knowledge (CLoK)

Title	Assessing the value of action learning for social enterprises and charities
Type	Article
URL	https://clok.uclan.ac.uk/id/eprint/16871/
DOI	https://doi.org/10.1080/14767333.2017.1288081
Date	2017
Citation	Smith, Sue and Smith, Laurie (2017) Assessing the value of action learning for social enterprises and charities. Action Learning: Reseach and Practice. pp. 1-13. ISSN 1476-7333
Creators	Smith, Sue and Smith, Laurie

It is advisable to refer to the publisher's version if you intend to cite from the work.
https://doi.org/10.1080/14767333.2017.1288081

For information about Research at UCLan please go to http://www.uclan.ac.uk/research/

Assessing the value of action learning for social enterprises and charities

In this paper we evaluate action learning for leaders of social enterprises and charities. Based on ethnographic research including participant observation, facilitator reflective diary notes and in-depth, qualitative interviews with participants of two action learning sets undertaken over eight months, analysed using Wenger et al.'s (2011) value creation framework, we show how the current and future value of action learning is perceived by the participants. We seek to give a deeper understanding of the perceived value of action learning in the context of the not-for profit sector. We discuss how the value creation framework can be used to think about learning interventions such as action learning, the value of which is notoriously challenging to articulate both in terms of evaluating action learning and forward planning value.

Key words: action learning; value; social enterprise, charities, evaluation

Introduction

This paper presents the results from a piece of research assessing the value created from two action learning sets (ALS) of leaders and managers of enterprises in the not-for-profit sector (social enterprises and charities).The findings show that using Wenger et al.'s (2001) value creation framework as a way of presenting a typology of value provides a useful evaluative tool for assessing the value and impact of action learning. We explore how the framework can also be used to forward plan the [perceived] value of activities such as action learning**.**

We first locate action learning within social constructionist forms of learning and the applicability to the small and medium sized (SME) sector which incorporates social enterprises and charities. We consider the challenges around evaluating such learning interventions. We then go on to discuss the research question and methodology used, presenting the empirical data in the format of the value creation matrix. This is followed by a discussion which looks at the value of action learning, what we can learn from the value creation framework, to what extent value can be forward planned and how this can be used to in practice, particularly to think about the value of action learning beyond the set members (in this case for funding bodies). The paper will be of interest to researchers and

practitioners of action learning and also to policy makers as it looks at assessing the impact of business support interventions.

Social learning, social enterprise and the evaluation of action learning

Social constructionist perspectives on learning have shifted an emphasis of knowledge and knowing from an epistemology of possession to one of practice (Cook and Brown, 1999). Such approaches to learning support the notion that learning is a relational process, fundamentally located in a social context. This is of particular relevance to action learning, which advocates collaboration and participation as frameworks for learning. Such approaches are being recognised as useful in the SME context; there is a growing literature on the benefit of constructionist approaches to learning for small business, in particular the benefit of action learning (Clarke et al. 2006, Jones et al, 2014; Leitch et al. 2009). Clarke et al. (2006) argue that within this view the owner-manager is not seen as simply present in hand but relationally engaged in the creation of the conditions, which make up his or her world through interaction with the environment around them. Pittaway et al. (2009) argue the value of action learning for entrepreneurs is in helping them to deal with the isolation that can be experienced when running a business. Whilst leaders of many social enterprises and charities typically have boards that can support the strategic (and operational) direction of the enterprise, the leaders still have to deal with many of the same issues facing small businesses in the for-profit sector (for example, income generation, cash flow, managing and motivating a workforce) and the leader or manager of them taking on the many roles a leader of a small business typically has: HR manager, finance manager, sales director and so on. The point of departure from the homogenous grouping of 'SMEs' is that social enterprises have an overt commitment to maximising social value or social capital from non-profit pursuits, creating economically sustainable solutions for social problems (Tracey and Phillips, 2007). This is true also for managers of social enterprises who, as Weinstein (2005, 214) argues are 100% committed to their projects; are by definition courageous; and place the outcome of their work high above any financial return while realizing that each project needs, eventually, to be financially self-sustaining.

. Much of the literature recognises that there is often a mismatch between the values of the sector and the management (and leadership) skills and competencies needed to ensure the venture is successful. Action learning is seen to provide a mechanism for addressing real-life business issues whilst developing leadership and management skills (see Pedler et al, 2005). However, very few studies have considered learning within the context of social entrepreneurs (see Howorth et al., 2012). Lawrence et al. (2011) argues there has been very little systematic analysis of the specific challenges of educating social entrepreneurs, or of the effectiveness or variations in pedagogy but action learning has been researched in terms of the impact it can have on entrepreneurs generally. The approach of action learning as connecting practice and theory through reflection, learning by doing and generating a social rather than individual cognition would appear to have immediate connections with the challenges of managing small businesses (Rae, 2009, 290). In this sense action learning is more than creating a peer network as it allows real-life problems to be worked through with others who understand and can empathise.

Pittaway et al., (2009, 266) state how general small business support has not widely adopted action learning and note that there are a few studies that outline what entrepreneurs gain from such an approach. More work is needed in this area. There are many unanswered questions concerning action learning for the benefit of SMEs (Gibb, 2009). This is particularly true of social entrepreneurs and social enterprises. The complexities of the sector clearly make it a challenging one in which to work yet few studies have considered the specific issues surrounding learning among social entrepreneurs. Despite the pressures on social entrepreneurs to develop their skills and knowledge, particularly in the area of management and entrepreneurship, research on learning and education within the context of social entrepreneurship remains very limited. For Powell and Houghton's (2008,176) SME research participants, action learning enabled them to 'bounce ideas off against each other' and learn in a relaxed way with 'partners in adversity' to become more innovative in their work for wealth creation. Intuitively, this should extend to social entrepreneurs but little has been written on the value and impact action learning has for social enterprises. This is a central aim of this paper. Accordingly, this paper seeks to show how assessing value can contribute to understanding the value of such forms of social learning for both the learners and the educator..

. Action learning is not, however, a panacea for work-based problems, issues, challenges and so on. Nor is it the only solution for leaders and managers of SMEs including social enterprises and charities. The social constructionist pedagogy underpinning the approach can also be seen to add to the challenges of it not being a 'one size fits all' learning intervention. As Leitch et al. (2009, 246) note, it is difficult to succinctly define what action learning is or what it looks like. Further, they state the fact that action learning can be considered to be an idea in evolution that might be clearly understood or recognised raises implications for both research and practice. Fox (2009, 8) argues it does not follow automatically that having all managed something equips the members of an action learning set to comment competently or even usefully on some managers' specific management problem. It might help or it might just *feel* helpful. There are dangers of action learning becoming talking shops and whilst many are strong advocates of the approach and there is much literature to extol its virtues, more can be done to think through the value of it as a developmental approach. This paper aims to contribute to this.

The context

Two action learning sets made up this study consisting of managers and leaders of enterprises in the not-for-profit sector, made up of social enterprises and charities. Other literatures unpick in detail the differences and similarities of the two types of organizations, but we are using the broad term 'social enterprise' in the context of this study to incorporate both. It is beyond the scope of this paper to address the nuances of each.

The sets were fully funded by a sub-regional government initiative which sought to develop leadership capability in the SME sector. Recruitment of the ALS was through a social enterprise which had access to a vast array of businesses in the social enterprise sector. In tandem with a university (who hosted the set meetings), the social enterprise recruiter promoted the opportunity to participate in action learning through its extensive networks. Approximately 20 people expressed an interest in participating and the social enterprise recruiter conducted a telephone or face-to-face

'interview / meeting' to explain what action learning was, what would be expected of the participants, the time commitment needed and the type of learning that would be experienced in order to maximise the learning potential. This process acted like a filter as not all people who expressed an interest participated in the resultant ALS which were made up of 11 participants. Thus participation was self-selecting and participants had an idea of what they were going to be undertaking (as much as this can be achieved until they actually participated experientially!).

Of the 11 organizations, seven had the legal status of social enterprise and five, that of charity. All had goals of sustainability and were addressing ways of diversifying their income streams beyond grant capture and funding. It is in this vein that we are grouping them into the category 'social enterprise'. The heterogeneity of the organizations can be seen in table 1. The 11 participants were divided randomly into two ALS, which each met a total of six times over eight months (i.e. once every six weeks or so).

During the recruitment process the social enterprise recruiter also explained that the partner university wanted to research the ALS and sought informed consent. Whilst there was an option not to participate in the research, all 11 said they were happy to do so and permission was gained in writing from them all. The research design was influenced by the consent of the participants which is expanded on below.

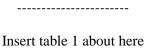
Insert table 1 about here

Table 1: Biographical details of the participants

Each ALS had the same facilitator and the action learning approach used resonated with Rae's (2009) definition of action learning as a structured and collaborative process of enquiry undertaken through questioning, acting, sharing experience and reflecting on problem-solving in practical situations. The

facilitator followed the approach of Revans (1983) and matched the criteria set out by Pedler et al. (2005) whereby questioning was the main way to help participants proceed with their real-life problems, and learning from reflection on actions taken. Fundamentally, the set members did not offer advice to one another but sought to think about their issues differently or come to some actions through the process of being asked to think about the issue through a series of open questions

Methodology

This research asks; 'what value is action learning for social enterprises and how is this created? We advocate that a qualitative approach was needed in order to understand the meanings and nuances associated with the learning experiences which, we argue, are socially constructed. Each ALS had the same facilitator and researcher; both participated in the research. At the first ALS meeting, the researcher explained the focus of the research and that she wanted to capture data by observing the ALS and conduct some follow up interviews. The first ALS suggested that she sat outside the ALS circle of chairs rather than be in the circle with them. Accordingly, the researcher sat outside the circle and suggested this to the second ALS also which they agreed was a good idea. The researcher acted akin to what Gans (1968) refers to as total researcher (one who observes without any personal involvement in the situation under study) and to what Adler and Adler (1987) describe as peripheral membership whereby the researcher observes in the setting but does not participate in the activities. The facilitator also participated in the research (with agreement from each ALS) by keeping a reflective diary which was completed after each set meeting. Both ALS created ground rules which acted as a learning contract between the members. The facilitator and researcher signed up to these also, especially around the aspect of confidentiality. Accordingly, neither the researcher nor the facilitator made a note of anything related to their actual issues discussed, focusing more on how they were interacting with one another and teasing out what value was being created for them.

In addition to the observations the researcher and facilitator undertook in-depth, qualitative interviews in the place of work of each participant. These were carried out towards the end of the ALS

meetings and after they had completed the intervention. The broad aim of the interviews was to explore what value the participants were getting or had got from the ALS and how they thought this was so and what they might do in the future because of participating in the ALS.

Data analysis using the value creation framework

The researcher's observations, facilitator's reflective diary and qualitative interviews yielded a wealth of qualitative data. These different forms were all typed up and the researcher and facilitator worked together to analyse the data using Wenger et al.'s (2011) value creation framework as a lens through which the data could be used to articulate a typology of value. This framework has been used to promote and assess value creation in communities and has been used by researchers and practitioners alike. To this end it includes a theoretical framework and toolkit for helping professionals to tell stories on the value that networks and communities create when they are used for learning and to articulate how these activities result in desired outcomes that improve teaching practice (Wenger et al., 2011, 5). Wenger et al. (2011) define value creation as the value of the learning enabled by community involvement. In this context the community is the ALS, although we recognise this is a rhetorical tool to loosely describe the ALS, We appreciate our ALS were constructed based on participants who were interested in participating in this learning intervention and then put together in to two separate ALS at random. The principles of the framework are applicable in that the focus is on the searching for and making explicit different types of value from a socially constructed situation. In this context, that is the ALS. Specifically, Wenger et al., (2011, 11) use the term community to define a learning partnership among people who find it useful to learn from and with each other about a particular domain. They use each other's experience of practice as a learning resource and they join forces in making sense of and addressing challenges they face individually or collectively. They argue this needs to be explored in the context of narratives distinguished which define a spectrum of value creation (ibid). A more detailed explanation of the methodology and in-depth information on the cycles and

corresponding narratives can be found in Wenger et al.'s (2011) paper but essentially, the framework consists of five cycles which are brought to life in table 2.The ethnographic data, interviews and reflective diary were analysed and re-organised in to what Wenger et al. (2011) term 'value creation stories' and plotted against the five cycles of value creation. Wenger et al. (2011) argue these value creation stories help to build a reliable picture of how the community (in this case the ALS)was creating value across different cycles (see figure 1). Further, they argue, the idea is to generate a value-creation matrix to create a rich picture of the value created by learning in these social contexts. This rich picture is from the perspective of the people in a given community. Qualitative research has received criticism in terms of generating insights and hypotheses from small samples (see Oakley, 1999). The important point is that it is not the typicality or the representativeness of the case itself that allows us to generalize from it, but the clarity of the theoretical reasoning. An approach relevant to this research and the use of the value creation framework might be to consider the concept of trustworthiness or credibility of the research, the methods and the data analysis. As discussed this study is underpinned with a philosophical position that views knowledge as socially constructed. One question which tends to be applied to qualitative research involving participant observations is whether it is a credible piece of work. This credibility resonates with the more traditional term of reliability. This also connects with the need for triangulation. One different way of thinking about triangulation is presented by Richardson and Adams St. Pierre (1994, p. 522) who argue that in postmodern research: "we do not triangulate; we *crystallize*". Ellingson (2009, p.11) states: "crystallization depends upon including, interweaving, blending, or otherwise drawing upon more than one genre of expressing data."

The in depth qualitative interviews teased out the stories which helped to increase the reliability or credibility of the data and to test the interpretations that were being made with the observational data. The value creation framework was used as a lens on the data to help organise it in a way that indicates the different type of value being created across the cycles. In order to bring each value cycle to life we have provided a vignette for each cycle. The term 'vignette' in used in the tradition of Wenger (1990, 1998) who presents vignettes of a composite character through which

he tells the story of a fictional day. The character is a rhetorical device for Wenger to present some of his findings in a concrete, concise way. It is in this vein that I present the vignettes below which are based on real events but sometimes are an amalgamation of partial descriptions observed and multiple delegates" words and experiences. They are written as amalgamations of real events of the ALS combining the researcher's ethnographic observations, the facilitator's reflective diary and the qualitative interviews which bring together the different data. Accordingly, the vignettes are an amalgamation of real events and the characters represents a combination of real people, though pseudonyms are used.

Merriam and Associates (2002, 26) suggest that 'member checks' can be used as a strategy for achieving internal validity. The data analysis was underpinned by a process which Cousin (2007) argues involves thinking *with* the data. This ensured that the value creation framework was not used as an evaluative tool but as a way of understanding theoretically and practically what value (and how) was created by the set members because of their participation in the ALS. The vignettes presented in table 2 were shared with the participants in the ALS who were invited to comment on our interpretations. We do not think that these approaches totally ensure that our data and analysis are reliable in the more traditional form but we do think that they help in increasing credibility and trustworthiness.

Insert table 2 about here

Table 2: Value creation perceived by the participants

Discussion

The study shows that action learning had clear benefits for the participants as outlined in table 2. One outcome of the ALS was a strong sense of empathy within the group and a clear desire and commitment to help one another. Although the participants didn't necessarily talk about this as value per se they were all dedicated to the process and developed an understanding that action learning was helping them in their work (and home life) practices. There were two things that were brought up often. The first was the usefulness of using open questions to tackle a problem both in the ALS and then continuing (or at least trying) to use the practice outside of the ALS. The second was how their issues were all relevant to one another despite the contexts being different. Pittaway et al. (2009, 280) have also found this and highlight three learning benefits of action learning for small businesses; firstly, it enables them to envisage having to address the same problem in their own business: allowing them to consider a 'future-to-come' that might involve dealing with a problem currently being addressed by another participant of the learning set; secondly, it allows them to appreciate the challenges presented by an industrial context different from their own, and; thirdly, it allows them to see the decision-making process of another entrepreneur who might draw different conclusions from those they would have reached with the same information.

We argue that value is being created because of the environment and practices of action learning. It provides a safe and confidential space to work on real issues in a constructive way. Even when someone else's issue is being worked on this provides value for the others who have the opportunity to think about how they might tackle an issue as well as helping them to practise their open questioning skills which can be used outside of the ALS; a form of vicarious learning.

Something we feel is important is the role of the facilitator in helping the participants learn how to use action learning to work on issues. Without a facilitator there is a danger that the ALS could become a talking shop, especially as cycle 1 of the framework shows how it can provide immediate value in the form of relief through talking about issues in an environment where others understand and empathise. Although (in this instance) the facilitator role does not share the identity or purpose of the set members, we argue the role is vital for value creation and helping the set members get beyond cycle 1.

The framework has helped to separate the types of value being created and can be used as an evaluative tool which is always important for funded initiatives such as the ALS in this study. A facilitator / educator implementing or running an ALS will usually know what the ALS will be able to achieve (or hope to achieve) and will have experience of the different forms of value gained by the participants. However, another stakeholder may not and this may need to be made more explicit up front and / or in the form of evaluation. Hirsh et al. (2011) point out that although evaluation is considered to be a valuable activity many developmental activities and processes have little evaluation of their impact before organisations transition on to the next activity. Edmonstone (2015,133) notes that evaluations of development programmes have depended largely on the impressions formed by their participants, often after the event. Further, he points to a number of challenges in relation to evaluation and action learning; it is relatively easy to collect data on reactions (thoughts and feelings); slightly more difficult, but not impossible, to collect data on learning (knowledge, skills and attitudes gained or changed); more problematic to collect data on changes in performance behaviour and very difficult indeed to collect data on outcomes (the impact or effect of changed behaviour on organisational performance). The move from reactions to outcomes introduces a significant number of intervening variables (other things happening to the individual and / or going on in the organisation) which make it more difficult (some would say impossible) to ascribe a simple cause-and-effect relationship. We argue Wenger et al.'s (2011) value framework can be used in both summatively evaluating learning interventions such as action learning and could extend to formatively planning value before or during the process. In doing so, it is hoped that the framework can be used to give an alternative perspective on the cause-and-effect relationship by adopting a relativist standpoint as value is ascribed by the participants.

Attracting public funding involves writing bids and planning the outcomes of the engagement(s). Although Stewart and Beaver, (2004) recognise that various government-backed initiatives have sought to promote learning and development in SMEs, and funding has been consistently available to help SMEs take advantage of these, Clarke et al. (2006) state that SME response to such initiatives has remained mixed. Value needs to be articulated to stakeholders other

than those partaking in the learning intervention. The value creation framework therefore can be a useful evaluative tool for gathering 'evidence' of value during and after the engagement also. However, what about forward planning value? Facilitators of action learning will be thinking about the desired impact or learning outcomes (indeed this is applicable to all learning interventions). Sometimes there can be a tension between what 'educators' think these will be and what the participants think they will get out of the process. The value creation framework can be used as a structured approach to enable us to think about what value we think should be achieved across the five cycles especially as it is very easy to only get to cycle 1. Facilitators / educators and so on need to be able to forward plan (or at least think through) what value we think can be created. Sometimes this will surpass the expectations of both educator and learner and other times it will fall short.

The framework was designed to capture value creation stories which by their very nature would be after the event. Edmonstone (2015, 133) argues such an approach makes it difficult to form an accurate impression of the impact that a programme may have had on its participants and on their organisation(s). This is partly because of the retrospective nature of such evaluation, and also partly due to a (perhaps inevitable) glow that surrounds recollections of events through which participants passed. Bringing in participant observation, we argue, offeres a richer use of the value creation framework and an opportunity to explore value as it is being acted out. We were able to follow the value (which sometimes didn't necessarily pan out as planned), for example, a set member would present his/her issue which the set members worked on. They then went away with a set of actions. At the next set meeting they reported on those actions and reflected on the impact which may have led to new actions or a need to tackle the issue in a different way. If we had only conducted qualitative interviews, we feel we would have missed the richness of the experience of the ALS.

Although Wenger et al. (2011, 8) propose the expected value cannot always be defined in advance in terms of predictable or measurable outcomes, we believe that the framework can be used to help us to think more critically about what we want the learners to experience and achieve. Wenger et al. (2011, 8) argue that an important form of learning takes place as members and other stakeholders create, negotiate, and sometimes reconsider and change the narrative of value creation.

There may be some middle ground on forward planning value. Any learning intervention should be underpinned by an appropriate pedagogy which sets out to create value even if the term 'value' isn't used. We argue that the value creation framework can be used to aid the design process of a learning intervention or at least to help educators and practitioners think more deeply about the impact and value that can be created.

Conclusions

This paper has used Wenger et al.'s (2011) value creation framework to look at the value created for managers and leaders of social enterprises including charities engaged in action learning as part of a sub-regional initiative to develop leadership in SMEs. We have shown that a typology of value has been created and perceived by the participants. Action learning has shown to provide a safe and confidential space for SMEs to work on real life issues and this extends to SME-sized social enterprises and charities. We have argued the role of the facilitator is integral in helping the set members learn the practices of action learning and to move beyond the learning intervention becoming a talking shop. Value is also created because the members genuinely wanted to support one another and there was a great deal of empathy in the set. Using participant observation as part of gathering value creation stories enabled us to follow the set members issues over a period time, learning about what actions were taken and how impactful (or not) these were. This helped us to tease out the longitudinal value over the lifespan of the ALS.

We have argued the value creation framework can be used to think more deeply and critically about the value of learning interventions such as action learning for social entrepreneurs and SMEs more generally. We believe this is relevant for action learning per se as both an evaluative tool and one which can be used to think through intended value, which is transferable to any given learning intervention. This is particularly important when other stakeholders, such as funding bodies are involved and we argue the value creation framework can be used as a compelling tool to forward plan, evaluate and articulate the value of the intervention.

We leave with some questions unanswered. It was not our intention to contribute to a methodological debate about the use of the value creation framework but in using it we have unwittingly contributed to this. For example, we have shown that data in the form participant observation and facilitator diary has given depth to the value creation stories that qualitative interviews alone may not have achieved. We were able to follow the value throughout the life of the ALS as opposed to teasing out the value half way through or at the end. However, we leave the reader with some questions; for example, how does gathering data by different methods other than through value creation stories in their true sense have implications for the model? What are the implications of using the value creation framework to work with set members to think about the 'value-to-come' from participating in the ALS? Is the value perceived by the leaders and managers of the social enterprises and charities in our study different to that of participants from the private sector, larger organisations, people from the same place of work and so on? Likewise, might there be a difference in perspective from where set members 'come from' in terms of forward planning value? And what implications might this have on practice? We invite readers to think with us on these questions.

References

Adler, P. A. and Adler, P. 1987. *Membership Roles in Field Research*, Newbury Park, CA, Sage Publications.

Cook, S.D.N. & Brown, J.S. (1999). Bridging epistemologies: the generative dance between organizational knowledge and organizational knowing. *Organization Science*, **10**(4), 381-400.

Cousin, G. 2007. "Thinking with data", *Educational Developments*, March 2007

Available at: http://www.seda.ac.uk/resources/files/publications_16_eddev8_1.pdf

Clarke, J., Thorpe, R.., Anderson, L., and Gold, J. 2006. "It's all action, it's all learning: action learning in SMEs", *Journal of European Industrial Training*, Vol. 30 Iss 6 pp. 441 – 455

Cook and Brown (1999)

Cunliffe, A. L. (2004) "On becoming a critically reflexive practitioner", *Journal of Management Education*, 28 (4), pp. 407-426.

Edmonstone, J. 2015. The Challenge of Evaluating Action Learning, Action Learning: Research and Practice, 12:2, 131-145,

Ellingson L. (2009). *Engaging Crystallization in Qualitative Research: An Introduction*. Thousand Oaks, CA, Sage.

Fetterman, D.M. (1998) *Ethnography Step by Step,* Thousand Oaks, CA, Sage.

Fox, S. (2009) "Contexts of teaching and learning: an actor-network view of the classroom", in Edwards, R., Biesta, G. and Thorpe, R. (eds) *Rethinking Contexts for Learning and Teaching: Communities, Activities and Networks*, Abingdon, Oxon, Routledge.

Gans, H.J. (1968) "The participant-observer as human being: observations on the personal aspects of field work", in Becker, H.S., Geer, B., Riesman, D. and Weiss, R. (eds) *Institutions and the Person: Papers Presented to Everett C. Hughes*, Chicago, Aldine, pp. 300-317.

Gibb, A. 2009. 'Meeting the development needs of owner managed small enterprise: a discussion of the centrality of action learning', *Action Learning: Research and Practice*, **6**, pp. 209–228.

Hine, C. (2000) *Virtual Ethnography,* London, Sage.

Hirsh, W., Tamkin, P,. Garrow, V. and Burgoyne, J. 2011. Evaluating Management and Leadership Development: New Ideas and Practical Approaches. Brighton: Institute for Employment Studies.

Howorth, C., Smith. S.M. and Parkinson, C. 2012. "Social Learning and Social Entrepreneurship Education", *The Academy of Management Learning and Education.*

Johnson, P. and Duberley, J. (2000) *Understanding Management Research,* London, Sage.

Jones, K., Sambrook, S., Pittaway, L., Henley, A. and Norbury, H. 2014 Action learning: how learning transfers from entrepreneurs to small firms, Action Learning: Research and Practice, 11:2, 131-166

Lawrence, T. B., Phillips, N., & Tracey, P. 2011. Educating social entrepreneurs and social innovators. Call for Papers; Academy of Management Learning & Education. http://www.aom.pace.edu/amle/2012SI_CF:asp.

Leitch, C. M., McMullan, C., Harrison, R. T. 2009. Leadership development in SMEs: an action learning approach. *Action Learning: Research and Practice* **6**:3, 243-263.

Merriam, S. B. and Associates. 2002. *Qualitative Research in Practice: Examples for Discussion and Analysis,* San Francisco, CA, Jossey-Bass.

Oakley, A (1999) "Paradigm wars: some thoughts on a person and public trajectory", *The International Journal of Social Research methodology: Theory and Practice, 2,* (3) 247-255

Pedler, M., Burgoyne, J., and Brook, C. 2005. "What has action learning learned to become?" *Action Learning: Research and Practice,* 2 (1), pp. 49-68

Pittaway, L., Missing, C., Hudson, N. & Maragh, D. 2009. "Entrepreneurial learning through action: a case study of the Six-Squared program", *Action Learning: Research and Practice*, 6:3, 265-288

Powell, J.A., and J. Houghton. 2008. "Action learning as a core process for SME business support", *Action Learning: Research and Practice,* 5:2, 173-184

Rae, D. 2009. "Connecting entrepreneurial and action learning in student initiated new business ventures: the case of SPEED", *Action Learning: Research and Practice*, 6:3, 289-303

Revans, R. 1983. *The ABC of Action Learning,* Bromley, Chartwell-Bratt.

Richardson, L. and Adams St. Pierre, E. (1994) "Writing: a method of inquiry", in Denzin, N.K. and Lincoln, Y.S. (eds), *Handbook of Qualitative Research,* Thousand Oaks, CA, Sage, pp. 516 – 529.

Stewart, J. and Beaver, G. 2004. HRD in Small Organisations: Research and Practice, Routledge, London.

Thorpe, R., Cope, J., Ram, M. and Pedler, M. 2009. Leadership development in small- and medium-sized enterprises: the case for action learning. *Action Learning: Research and Practice* **6**:3, 201-20

Tracey, P. and Phillips, N. 2007., "The distinctive challenge of educating social entrepreneurs", *Academy of Management Learning and Education*, Vol. 6 No. 2, pp. 264-271.

Weinstein, K. 2005. "The power, and dilemma, of honesty: action learning for social entrepreneurs", *Action Learning: Research and Practice*, 2:2, 213-219

Wenger, E., Trayner., B. and de Laat, M. 2011. Promoting and assessing value creation in communities and networks: a conceptual framework. Open universiteit, Ruud de Moor Centrum. http://www.ou.nl/documents/14300/23cd8044-ce98-48d3-8733-8fa0404380ab

Wenger, E. 1990. *Toward a Theory of Cultural Transparency: Elements of a Social Discourse of the Visible and the Invisible,* thesis (Ph.D), University of California at Irvine, and IRL-Monograph 91-0007.

Name	Type of activity	Registered status	Gender	Position
Action learning set 1				
Adam	Children's centre	Charity	Male	
Katie	Community mediation service	Social Enterprise	Female	Managing Director
Lorraine	Food bank	Charity	Female	Founder and Managing Director
Beth	Specialist services for disabled children and their families	Charity	Female	Co-founder and Managing Director
Mike	Education provider	Social Enterprise	Male	Volunteer Manager
Zara	Membership organization for social enterprises	Social Enterprise	Female	Chief Executive Office
Action learning set 2				
Mary	Home care	Social Enterprise	Female	Founder and Managing Director
Rachel	Mental health service	Social Enterprise	Female	Chief Executive Officer
Lance	Alcohol peer support service	Social Enterprise	Male	Manager
Narta	Advocacy service	Charity	Female	Manager
Simone	Community Foundation	Charity	Female	Managing Director
Natalie	Cultural arts social enterprise	Social Enterprise	Female	Manager

Table 1

Cycle 1: Immediate value

e.g. a relief to share the issue, feeling more relaxed

The set members are settled in a circle on the low, red, comfy chairs, there are six set members and the facilitator. They are 'checking' in with one another saying how they are feeling right now in relation to their work and being here today. Adam is the last one to contribute and says with a puff, *"It's a pleasure to be here and not at work, honestly."* The facilitator checks that they are ready to move on to Katie's issue. The group know that the air time means this is the time for Katie to present her issue and for them to use an open questioning approach to help her think more critically about the issue and to hopefully come to some resolution or actions.

The set work on Katie's issue for about half an hour and she feeds back that she is struggling to find a way forward. The facilitator asks her to reflect on how she is feeling and Katie says, *"I feel much better for just being here...I know you understand".* The other set members nod in agreement and Katie continues, *"It's a safe environment without risk attached to it. Saying things out loud helps me here".* She carries on to explain that she isn't sure what she is going to do just yet but wants to use the session today to give her some 'head space' to think about her issue and talk through it with the others. Towards the end of her air time she says, *"I've got it off my chest, I feel a lot better and I'm calmer now".*

Cycle 2: Potential value

e.g. receiving help, identifying actions

After a ten minute coffee break the set members settle back down. This time they bring their chairs a little closer to tighten the circle and most have pens in their hands, notepads on their laps. They fall silent and look at Mike to indicate they are ready to hear his issue. Mike spends ten minutes or so talking about his issue, what the history of it is and some factual information he thinks would be useful to share. The facilitator asks Mike what he wants from this session, he looks to the floor, thinking, and says, *"to shed some light on this problem and to find a way through it".* The set spend about 40 minutes working on Mike's issue, asking him questions that are prompting him to think about the issue in a different way. During this time Mike becomes animated and says, *"That's it, that's what I need to do. You've empowered me...that's a must".*

At the end of this time Mike is asked to feed back on what actions he is going take forwards and he lists a number of things from the notes he has taken. The facilitator then conducts a process review, specifically to reflect on what went well and what the set members might have liked to do differently. To signify a change between the air time and the process review the delegates push their chairs back a couple of inches to widen the circle. Mike feeds back on the process, *"you've given me a lot more things to think about... You've put me in the direction of where I need to be. I know what I need to do".* Another set member, Lorraine, says that "*I really enjoyed it actually, you've helped me have some idea on what we should be doing in my business even though Mike's issue was totally different. Listening to others helps you think about your own decisions and bank some ideas for the future".*

Cycle 3: Applied value:

e.g. report on actions, what happened after the ALS

Last time Adam worked on a complex issue and today he is feeding back to the set on what happened. He gives them an overview of what he did and what happened. He explains that the decision he came to was probably the right solution in the end and says that he is very grateful to what he got out of the group last time, *"I've put my issue to bed, it's done and dusted".* The facilitator turns to Zara who also had an issue last time and asks her to feed back. She says, *"...you know, discussing my issue in a sort of clinical environment...what*

I mean is without personalities [at work] getting in the way. I managed to apply my solution to the situation and it's been resolved."

Cycle 4: Realized value
e.g. impact these actions had, what changed as a result of the ALS

After returning back to the office from the ALS, Lance felt energised. Realising he had to act now he didn't open his emails but spent the afternoon re-writing the business plan. He thinks this is the biggest thing he has done in the three years of setting the social enterprise up. Throughout the next month he sets up meetings with his team, restructures the line management and communicates his vision for the organisation. It's hard work and initially his team are reluctant to the changes he is making. However, as the month goes on he sees a noticeable difference in the team and they seem a lot happier. By the time Lance goes to the next ALS he has even more to report. He tells the set how his team are coming up with their own solutions and how people are noticing changes. He feels happier and says he wants to do more. Another set member, George, says that his team are also noticing changes. His issue last time was about whether or not to take on another apprentice and he chose not to. His team feel they have opportunities to develop as the tasks has been shared out amongst themselves which is what they said they wanted.

Cycle 5: Reframing value
e.g. new considerations / reflections on the value

Beth is at work and as usual there are a million and one things she has to do today. There is a knock on her office door which is ajar, it is Kerry the nursery manager. They exchange pleasantries and Beth asks her how the meeting went yesterday. She tells Beth it went well but she thinks someone in the team is underperforming and she wants to know what Beth wants to do about this. Beth turns the question back to Kerry and asks her how she would like to handle this situation. Immediately, Kerry lists some approaches she has already been mulling over. Beth smiles and tells her this sounds good and asks her what she will do first and when. Beth reflects that using open questions is something she has learned from the ALS. Before the ALS she would have tried to solve Kerry's problem. She thinks how this is a new skill and how the open questions work at home too. She feels that this approach is helping her not to close off solutions but helps others to help themselves. Later, Beth reflects on how she handled Kerry today and realises that her team have been expecting her to act more like a manager. She realises that she has changed and has stopped 'doing the doing' and has begun to act more strategically which is what her team have been wanting from her. They're actually relieved she is doing this because she can work on the sustainability of [the social enterprise].

Table 2