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Action Learning to enable organisational change in rural businesses

Menter a Busnes (MaB), an economic development company based in Wales, UK, has been using group processes and specifically Action Learning with rural businesses since 2003. Action Learning is fundamentally a coaching process with the coachee being supported by a facilitated group of like-minded individuals who must be willing to learn and to change. The process is designed to develop management capabilities, instigate change and empower and encourage group members to create viable and sustainable businesses for the future. Action Learning is used by MaB's management development programme for Welsh farmers and foresters, namely Agrisgôp. This paper reports the results of a longitudinal mixed-measures study designed to evaluate the impact of the Agrisgôp programme. Three different questionnaires were developed and completed by over 1,000 Agrisgôp group members pre-, mid- and post-group participation. The results indicate that Agrisgôp's Action Learning intervention is successfully encouraging and supporting its group members to seek out, instigate and embrace change. The respondents reported increased confidence, improved communication skills, were better able to apply new information to their business, had a more positive attitude to change, and were more likely to have a long term business strategy as a consequence of the Agrisgôp group intervention. The quantitative analysis was supported by qualitative data. Some conclusions are drawn with regard to lessons learnt and possible ways forward, both for Agrisgôp and for this approach to programme evaluation.

Introduction

The use of group processes to encourage innovation and to transfer best practice is relatively novel in the agricultural sector. However, Menter a Busnes (MaB), a Welsh economic development company, has been utilising this approach since 2003, with a view to engaging more farmers for a variety of purposes and with a broad range of different groups. This article outlines how the company initially became involved with and subsequently developed group processes through the design, launch and delivery of the Agrisgôp programme which utilises Action Learning to strengthen management capabilities, develop new business ideas, instigate positive change and resolve issues. Whereas Owen and Williams (2012) discussed the broader Farming Connect programme, this paper focuses specifically on the Action Learning methodology utilised with Agrisgop groups and particularly the longitudinal mixed-methods tool developed to measure the impact of the programme.

During the initial development and establishment of the Agrisgôp programme, Action Learning (McGill and Beaty, 2001) was selected as the process best suited to Agrisgôp groups. To utilise Action Learning as a facilitation process with very traditional Welsh farming family businesses was in itself ground breaking and innovative, and also risky. However, despite being typically used previously in very large corporate institutions, Action Learning has proven to be a highly successful and flexible tool which continues to be the primary group facilitation technique used by the group facilitators – known as Agrisgôp Leaders (Pearce and Williams, 2010). It has been valuable in the development of ideas and resolution of issues; moreover, its group methodology involves the combination of support and challenge which is a key factor in changing mind-sets and attitudes to change. Burnes (2004) reports that the successful organisations in the twenty-first century are those that continually instigate change, despite the fact that seven out of ten change inter-ventions actually fail. In the Agrisgôp context, the support of a group of like-minded individuals through the challenging change process is considered not only to be very beneficial but also to increase the probability of successful change interventions.

Action Learning has enabled Agrisgôp Leaders to engage a target audience with a range of abilities and knowledge and has encouraged and strengthened commitment to the process and the group. Action Learning involves a group of committed individuals who regularly meet with an experienced facilitator, with each group member being given the opportunity to develop an idea or resolve an issue with the support of the group. Other group members are encouraged by the facilitator to ask clear, open, neutral questions with a view to supporting the group member to develop their own solutions. Butler and Leach (2011) cite many similarities between Action Learning and coaching, and Martin (2006) propounds that Action Learning is effectively group coaching, in that it involves a communally supportive group in which all members in turn share an issue, while the rest of the group act as coaches. Having facilitated Action Learning Sets since 2003 and increasingly being involved with coaching and mentoring, the author agrees that Action Learning is fundamentally a coaching process with the main difference being that a group of people (as opposed to a coach) are facilitated to coach the individual.

MaB has constantly researched and developed new group facilitation techniques for use in tandem with Action Learning. Agrisgôp Leaders continually introduce, trial, develop and share new and innovative, informal and typically short group facilitation techniques with their groups. Nonetheless, Action Learning continues to be the preferred primary technique utilised with Agrisgôp groups. The main reasons for this are that one of the main characteristics of the Action Learning process is a strong ethos of confidentiality, which not only very quickly establishes trust within the group but also instils commitment to the group and the process. The

fundamental Action Learning principle of support and challenge also creates an environment where positive change is encouraged and this consequently enables and empowers individuals to make difficult decisions because they are working with others. Indeed, the fundamental positive principles of Action Learning have largely become synonymous with the Agrisgôp philosophy and the relationship between Agrisgôp Leaders and their groups, even when not actually undertaking Action Learning. Action Learning is an extremely flexible and adaptable process and this has proven invaluable to Agrisgôp Leaders, all of whom develop (and have been encouraged to develop) their own variants – albeit still facilitating within certain important guidelines. Finally, the MaB experience would certainly support the assertion of the founding father of Action Learning, Professor Reg Revans, that Action Learning is 'deceptively simple – surprisingly powerful'.

During the development and delivery of the Agrisgôp programme, studies have been undertaken in order to monitor, review and improve its delivery. One such study evaluated Appreciative Inquiry (AI) and Creative Problem Solving (CPS) as an alternative group facilitation processes to Action Learning. The results indicated that group potency was significantly higher in teams which had undertaken AI than in the CPS teams (Owen, 2008). A summary of this study is presented in the Annex. A second study considered whether personality can be used to predict effective facilitators of organisational change and was described by Owen and Williams (2012). The main findings of this study indicated a strong correlation between consultant effectiveness and the factor of 'agreeableness' on the so-called Big-Five scale (Goldberg, 1990) and a less strong yet significant relationship between 'extraversion' and consultant effectiveness. This paper focuses primarily on the implementation and results of a third, more recent and more elaborate study based on a longitudinal mixed-measures questionnaire.

Rationale behind the study

As described above, Agrisgôp groups are recruited and then facilitated by an experienced Action Learning facilitator, employed by MaB and known as an Agrisgôp Leader. Over time, each group develops a close relationship with their Agrisgôp Leader and although later in the process the groups may bring in relevant experts and visit other businesses, the early stages of the group involve confidential, 'behind closed doors' Action Learning sets facilitated by their Agrisgôp Leader. Action Learning focuses group power and synergy to support and challenge each group member to embrace change and subsequently design, develop and implement action points to achieve the goals that they have identified. The group's relationship with their Agrisgôp Leader typically lasts fifteen months from start to finish (although in practice this can vary from three months to three years), with groups meeting at least six times and usually between twelve and fifteen times, normally on a monthly basis. The vast majority of groups have eight members; however, the range is between six and ten.

As a result of increasing pressure from several quarters, not least the funders, to quantify the impact (financial, perspective, attitudinal and continuing) of group-based organisational change programmes such as Agrisgôp, a study for this purpose was instigated. Evaluation of Action Learning programmes can either be undertaken to assess the impact or to improve future programmes (Pedler, 2008) and while the primary objective of this study was the former, the latter was also of interest. The study aimed to determine whether, through Action Learning, the Agrisgôp programme positively affected participants' capability and capacity to become more effective managers and therefore develop more viable and sustainable businesses. The null hypothesis (H_0) therefore states that for participants in this study there will be no significant difference in confidence, communication skills, resistance to change, ability to apply new information to and develop long term strategies for their businesses. The study's five experimental hypotheses are as follows:

- H_1: There will be a significant difference in confidence scores for Agrisgôp group members when comparing pre-, mid- and post-group participation;
- H_2: There will be a significant difference in communication scores for Agrisgôp group members when comparing pre-, mid- and post-group participation;
- H_3: There will be a significant difference in applying new information to the business scores for Agrisgôp group members when comparing pre-, mid- and post-group participation;
- H_4: There will be a significant difference in attitude to change scores for Agrisgôp group members when comparing pre-, mid- and post-group participation;
- H_5: There will be a significant difference in business strategy scores for Agrisgôp group members when comparing pre-, mid- and post-group participation.

Methodology

A longitudinal mixed-measures approach was adopted, and the study started in September 2011. Three different questionnaires were developed and completed by over 1,000 Agrisgôp group members pre-, mid- and post-group participation, and collated and analysed in 2014. The questionnaire design drew upon the principles used to measure similar and related psychological constructs, namely Bandura's Self Efficacy scales (Bandura, 2006), Spector's Locus of Control scale (Spector, 1988) and Oreg's resistance to change scale (Oreg, 2003).

Each questionnaire has two sections, the first is a quantitative section with five, nine-point Likert scales (labelled I to V) which are identical on all three forms (pre, mid and post-group participation). Agrisgôp group members were required to indicate how strongly they agree or disagree with each of the following statements:

I.   I am confident in unfamiliar circumstances;
II. I consider myself to be a good communicator;
III. I can evaluate new information and apply it to my business;
IV. I have a positive attitude to change;
V.   I have a long term strategy for my business.

Thus the quantitative element of the study consists of a repeated measures design with one categorical independent

variable (IV1) measured on three occasions. The continuous dependant variable (DV) is the Likert scale measurement from the questionnaire; therefore, with five Likert scales there are effectively five separate dependant variables DV1-DV5. The study's focus is on the interaction between the independent variable measured at three different points in time and the dependent variable in each of the five cases. The quantitative data were analysed with an IBM SPSS version 20 package (IBM Corporation, Armonk, New York, United States), utilising one way (repeated measures) ANOVA. This analysis was undertaken separately for each of the five DVs.

The quantitative analysis was supported by qualitative data collated from the questions (labelled a to c) listed in the second section of the questionnaires. Miles and Huberman (1994) suggested that linking qualitative and quantitative data can be useful for enabling one to support the other, enrichment of the analysis through development or amplification and through triggering new ideas and insights into the research question. The questions differed slightly on each of the three versions of the questionnaire, with group members being asked to outline (a) their three most important expectations (pre-group participation); (b) their three most important developments to date (mid-group participation); and (c) their three most valuable outcomes (post-group participation). This approach is consistent with the template method of thematic text analysis. The mixed-methods procedure utilised is based upon concurrent embedded strategy (Creswell, 2009) whereby the quantitative and qualitative data are collected simultaneously but the primary method – in this case quantitative – directs the research supported by the secondary qualitative data.

The qualitative data were therefore analysed with an initial template analysis used to consider themes which reinforced or added value to the quantitative analysis. The approach adopted is based upon King's (2006) thematic analysis of text. This methodology proposes that multiple interpretations can be made with any research and that therefore more flexible techniques with fewer constraining parameters are required. Template analysis differs from other thematic methodologies as it allows the researcher any number of coding levels and also combines top-down and bottom-up methodologies. Template analysis is particularly recommended for occupational psychology and business management research and is considered appropriate for applied type, large scale between case studies (Gibbs, 2012). NVivo 10 for Windows (QSR International, Melbourne, Australia) was used to code the data.

Agrisgôp Leaders were briefed to facilitate the completion of the questionnaires by all group members as follows: pre-group questionnaire – as soon as possible and at the first group meeting at the latest; mid-group questionnaire – as close to the middle of the group's life as practicably possible; and post-group questionnaire – as near to the end of the group as possible, operationally this will usually be at the last official meeting of each particular group. In line with guidelines for constructing questionnaires (Thomas, 1996; De Vaus, 2002), the first draft of the questionnaire was scrutinised and adapted by a panel of five senior Agrisgôp delivery and management staff, then piloted with three Agrisgôp groups and subsequently reviewed again by the panel to produce the current version.

Results

Quantitative results

For each of the five quantitative measures, Mauchly's test indicated that the assumption of sphericity had been violated, therefore degrees of freedom were corrected using Greenhous-Geisser estimates of sphericity. A repeated measures ANOVA carried out on the data showed that differences between conditions were unlikely to have arisen through sampling error and an overall effect size in each of the five measures indicated that the variation in error scores could be attributed to the Agrisgôp group intervention as follows:

- Increased confidence (49 per cent);
- Improved communication skills (51 per cent);
- Were more able to apply new information to their business (52 per cent);
- Had a more positive attitude to change (52 per cent);
- Were more likely to have a long term business strategy (13 per cent).

The results show that the null hypothesis (H_0) is rejected. Furthermore, the five hypotheses (H_1, H_2, H_3, H_4 are H_5) are supported, with significant differences being found in confidence, communication, applying new information, attitude to change and business strategy when comparing pre-, mid- and post-group participation.

Qualitative results

Owing to the fundamental longitudinal nature of this study, the qualitative data collected from the pre-, mid- and post-participation questionnaires are discussed separately. An overall comparison of the three sets of results indicated a shift over time in mind-set from an individual ("What is in this for me?") to a team ("How can I help this group succeed?") approach.

Pre-group participation

The pre-group questionnaire invited participants to state their three most important expectations for the group. This information is the first qualitative snapshot as new Agrisgôp group members start their participation in the programme, and represents the baseline from which the mid- and post-participation assessments will progress. Utilising template methodology for thematic analysis, the main codes (themes) and the subsidiary lower order codes developed after several revisions of the transcripts are listed in Table 1. There are relationships between some main codes in that "Learning" could fit under "Develop myself" and "New experiences" as well as under "Develop my business". Similarly, "Gain knowledge" would fit under "Develop myself"; however, within the flexibility of the template analysis methodology, this was considered to be the best fit at the final coding interval. The strong references to confidence and communication skills are clearly linked to the first two Likert scale questions.

These themes are very much those that might be expected

from participants entering a new programme, with the mixed feelings of excitement and apprehension relating to its newness and a sense of wanting to make the most of the opportunity. The completed questionnaires included many references to the newness of the situation, such as "Gather new ideas for the future"; "Learn how other people farm"; "Build upon the skills I already have"; and "Interact with like-minded people". There is a clear sense of a will to develop, to make the most of the experience and to build relationships which will be both satisfying and useful.

Mid-group participation

The mid-group participation questionnaire invited participants to state their three most important developments for the group to date. The main codes and subsidiary lower order codes are listed in Table 2. The results suggest an increasing sense of group power, synergy and positivity (even elitism) from being a member of the group. The overall impression obtained from the thematic analysis is that "Learn" and "Change" refer primarily to developing the business and "Group" and "Network" are more related to personal development. However, these are of course inextricably linked, particularly with family farming businesses, and relationships between some main codes continue to occur. For example, "Interesting visits" could fit under "Learning" almost as comfortably as "Network". There are also elements of learning under the "Group" main code. The link between "Change" and the Likert scale question on change is more tenuous in this dataset, but the overriding impression is that change is something that the Agrisgôp process is actually instigating and encouraging. Equally, references to increased confidence are predominantly attributed to membership of the group.

These themes are noticeably different from the pre-group participation codes and convey an impression that group members have a sense of urgency to move their businesses forward and to apply the newly-gained knowledge and positive enthusiasm to their businesses as quickly as possible. Example quotes for each of the main codes are "I think my business will benefit from new ideas"; "Group meetings have provided useful ideas and information that I can apply to my own business"; "We are all more confident and enjoying working as a group"; and "Visiting the woollen mill gave me an insight into adding value to produce". There is a clear sense that participants now have many experiences they want to share on the questionnaire and that they are not struggling to think what to write.

Post-group participation

The post-group participation questionnaire invited participants to give their three most valuable outcomes for the group. The main codes and subsidiary lower order codes are listed in Table 3. Again, these themes differ considerably from pre- and mid-group participation results, in part due to the fact that the qualitative questions vary slightly in each questionnaire, but also indicating attitude change and developing skills as a result of Agrisgôp participation. There is a greater sense of purpose, of individuals who are

Table 1: The most important expectations of new Agrisgôp group members formulated using template methodology for thematic analysis.

Main code	Lower order codes
New experiences	Fresh ideas; gain knowledge; share information; see other businesses; identify opportunities.
Develop my business	Learn; consider diversification; improve profitability; clarify aims.
Develop myself	More confidence; better communicator; different viewpoint.
Meet people	Network; develop contacts; exchange views.

Source: own composition

Table 2: The most important developments noted by Agrisgôp group members during their participation formulated using template methodology for thematic analysis.

Main code	Lower order codes
Learn	New ideas; gather information; useful talks.
Change	Transfer; improve; apply; develop.
Group	Discuss; share information; other members; confidence.
Network	Make new contacts; interesting visits.

Source: own composition

Table 3: The most valuable outcomes identified by Agrisgôp group members following their participation formulated using template methodology for thematic analysis.

Main code	Lower order codes
New	Ideas; information; initiatives; improved abilities.
Learning	Know about; discuss/talk; gain knowledge; develop.
Business	Develop; diversify; confidence; people skills; better management.
Group	Support; members; discussions; sharing problems.

Source: own composition

more confident in their business skills. Relationships occur between some main codes such as "New" and "Learning", and the lower order codes are mostly transferable, however the overriding themes sit clearer under each main code than with pre- and mid-group participation data. As regards links to the quantitative questions, it can be argued that the Likert scale question on change is connected to the three main codes of "New", "Learning" and "Business", and equally that this is a positive development, considering that instigating change is the main purpose of the intervention. "Confidence" (the topic of the first Likert scale question) appears as a sub theme under "Business".

The overall impression conveyed by this dataset is that there is less of a focus on the group than there was at the mid-group participation stage, although the group benefits continue to feature strongly. The sense of a development process is replaced by one of increased capacity as managers, and a desire to go out and make a real difference in their businesses. Moreover, in comparison to the pre-group participation stage the emphasis has shifted considerably from developing the individual to developing the business. Example quotes for each of the main codes are "Discuss new ideas to make agriculture profitable as we move forward!"; "Talking about each other's farm businesses and comparing each other"; "The opportunity to share views and discuss solutions in relation to developing my business"; and "Good group Action Learning process helps share knowledge".

Discussion

The expectation of MaB was that the significant change in the attitudes and abilities of those managers who have experienced the Agrisgôp process will enable and empower them to lead their own businesses creatively through the requisite change as advocated by Walinga (2008). The results of this study indicate that Action Learning based interventions such as Agrisgôp are effective in enabling and empowering managers so that they can successfully lead their organisations through change and consequently be part of more viable and sustainable business in the future. This fully aligns with the fundamental Action Learning concept that group members must be open to change and that the process itself supports and challenges this.

A question arises regarding the relatively low, albeit positive, value for respondents' scoring on question V, relating to long-term business strategy. The reason for this is not clear but anecdotal evidence (largely supported by the qualitative data) suggests one possible explanation. Some participants entering an Agrisgôp group believe (and therefore report pre-group) that they have a long-term business strategy, but the Agrisgôp process of business analysis and change management engenders a realisation that in fact they do not. It is also possible that the relatively short term nature of the Agrisgôp process allows insufficient time to examine/evaluate the business fully and develop a long-term strategy, whereas the other four measures are more easily achievable within the timescale. A fourth follow-up questionnaire (for example two years after the group's final meeting with the Agrisgop Leader) might shed more light on this point.

According to Bridges (2013), it is typically the transition through change that causes individual distress and the subsequent failure, and Burnes (2004) reports that around 70 per cent of change interventions fail. In relation to this, the qualitative data from the current study strongly indicate the importance of the support of the Agrisgôp group in sharing problems, developing ideas and increasing confidence. Being part of a supportive and forward-thinking group can assist group members through the difficult transitional phases. This is in line with the fundamental Action Learning principles of positively supporting and challenging group members through change (McGill and Beaty, 2001; Pedler, 2008; Butler and Leach, 2011). Furthermore, the quantitative data also support this premise in that they indicate a significant, increasingly positive attitude to change across the Agrisgôp timeline.

Action Learning, its process, rationale and methodology are key to the successful delivery of the Agrisgôp programme, but the approach is not a 'cure-all' and does not always succeed. Pedler (2008) reports that the process is neither infallible nor all-encompassing and there are several instances where Action Learning was not successful (Casey and Pearce, 1977; Oliver, 2008; Vince, 2008). Pedler (2008) also stresses the necessity for individuals and businesses to commit time and energy initially, because the payback benefits occur later. The Agrisgôp experience supports this view, with Leaders often reporting initial difficulties in recruiting and empowering new groups. This is because the eventual power that stems from the trust and confidentiality of established groups occurs only as a result of considerable initial commitment and effort from group members who are typically sceptical in the first instance. This is consistent with the qualitative data where at the pre-group participation stage responses primarily relate to *develop myself* and *my business,* with references to *group, support* and *share* occurring later at the mid- and post-group participation stages. The initial time and effort involved in establishing a culture of confidentiality and trust within groups is generally justified by the resulting positive support and synergy displayed by the majority of groups.

Pertinently, De Loo (2008) states that sharing failures is as important as promoting successes and that the reluctance of the Action Learning community to reflect upon and learn from negative experiences effectively ignores the fundamental principles of Action Learning. Managers and Leaders involved with the Agrisgôp programme certainly would not suggest that Action Learning always works well or that all Agrisgôp groups are successful. Nevertheless, it is overwhelmingly evident that Action Learning's flexible facilitative approach is well suited to supporting and challenging group members through positive change (Butler and Leach, 2011) and that it succeeds by focussing on the individual and empowering them to discover, develop and implement their own solutions (Revans, 2011).

Relevant literature consistently reports that the presence of effective change agents is essential for organisational change to succeed and that these may be external or internal (Hurley *et al.*, 1992; Burnes, 2004; Walinga, 2008; Buchanan and Badham, 2010). However, it is of note that the qualitative data in the current study makes little mention of the change agents, namely the Agrisgôp Leaders. It is difficult to believe that their impact is inconsequential and it is likely that, as the programme has developed, the Leaders have become adept at starting with the end in mind and gradually fading into the background as the group develops. Anecdotal evidence certainly supports this premise. It is also likely that change agents develop within the groups, a process encouraged by Agrisgôp Leaders who describe these internal change agents as 'lead horses'. It is considered good practice to encourage these internal change agents to develop their leadership skills and to instigate bottom-up change, as this not only benefits the group but also develops skills that are of value to their own business going forward (Collins, 2004). Several of these 'lead horses' have been recruited by MaB and subsequently trained to become successful and effective Agrisgôp Leaders.

By using tools such as Agrisgôp's longitudinal mixed-measures questionnaire it is possible and feasible to measure 'softer' qualitative outcomes of change intervention programmes, as described here. Greater utilisation and further development of these tools would benefit participants, delivery partners and funders. The future development of a reliable and valid longitudinal mixed measures-tool to assess the impact of coaching/facilitative type interventions is likely to be of interest to funders, project deliverers and anyone involved in coaching, facilitation or Action Learning.

In conclusion, when facilitated by well trained, highly motivated, experienced facilitators, Action Learning can be an effective tool for supporting personal and organisational

change. The Agrisgôp programme can therefore be expected to increase the number of more viable and sustainable businesses within the agricultural sector in Wales in the future. To support this process, empirically-based best practice should be more effectively integrated into the workplace and one way of achieving this is to encourage and support higher-level lifelong learning. Furthermore, programme providers need to become more involved in conducting research, in implementing the findings and sharing them with a wider audience.

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Annex

Comparing appreciative inquiry with creative problem solving

This study was undertaken in 2008 and considered other, more formal and structured facilitation techniques as alternatives to Action Learning, namely Appreciative Inquiry (AI) and Creative Problem Solving (CPS). AI was developed as an alternative approach to organisational progress and development through eradication of poor practice or mistakes (Lewis *et al*., 2008) while CPS was developed with a view to obtaining new perspectives on alternative methods of problem solving (Isaksen *et al*., 2000). Although the two techniques are unconnected, they both involve a day's facilitation in four stages which allows easy and relatively equitable comparison of the two processes. The methodology was taken from a study undertaken by Peelle (2006), who found that the direct problem-solving approach of CPS could result in negativity and a lack of joint leadership, while AI resulted in a greater sense of belonging and team confidence. For the Agrisgôp study, twenty-four participants in four equal-sized teams engaged in a day's facilitation of either AI (one Agrisgôp group and one group of Agrisgôp Leaders) or CPS (one Agrisgôp group and one group of Agrisgôp Leaders), and team potency was measured by individual questionnaires at the beginning, at the half way point and at the end of the session. The results suggested that although there was no effect on potency at the mid-task stage, group potency was higher at the post-task stage in both AI and CPS interventions. Furthermore, potency was significantly higher in the AI teams, when compared to the CPS teams. Team source had no significant effect on potency at any stage.

The Agrisgôp study indicated that CPS was more of a 'head-on' problem solving approach whereas AI was 'softer' and more creative; indeed, that CPS could be construed as more of a 'male' approach with AI being more 'female' in nature. Studies have shown that males and females behave quite differently in team scenarios, with groups with higher proportions of women being more effective (Fenwick and Derrick, 2001) while groups which have more men are more likely to experience conflict (Randel, 2002). Similarly, anecdotal evidence from many Agrisgôp Leaders suggests that women are much more group-minded than men, particularly in the early establishment stages of the group. This suggests a host of possible future studies into group facilitation techniques and the effect of gender; for instance – do men display higher performance levels with CPS and women with AI?