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The Design of the Action Project In Work-Based Learning

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The Design of the Action Project in Work-Based Learning

Executive Summary

This paper attempts to remedy the inattention heretofore paid to the action project in the work-based learning literature. It begins with the assertion that there can be no substitute for real-time experience in human resource planning and development programs. Action projects afford real-time experience by involving participants in concrete actions typically in their own organization. The projects are designed to have strategic value, thus contributing to or even challenging the goals of their organizational sponsor. While working on their project, participants engage in both individual and collective learning, results deemed as important as the business outcomes of their project intervention. The article goes into considerable detail noting the benefits but also the pitfalls of action projects.

The Design of the Action Project in Work-Based Learning

We are entering a new era of human resource development in which corporate educators are beginning to return learning to its natural location - to work itself. Referred to as "work-based learning," this new approach expressly merges knowledge with experience by allowing managers to reflect upon and learn from the artistry of their own action. There are many programmatic features in any work-based learning program, but perhaps the most notable is the action project. Whatever theories, competencies, or practices are exposed to participants, their ultimate learning of these subjects may depend upon their trying them out in actual situations. There is benefit to having participants test their newfound skills in a simulated setting, but ultimately, there can be no substitute for practice in the very midst of real live experience. Only then will participants know whether they can change their assumptions and behaviors in real time. Only then will they know whether a particular conceptual theory might help them wend their way through an operating problem or whether they may need to devise a new and alternative practice theory to help them make sense out of their tacit behavior.

The purpose of this paper is to characterize the design of the action project in more detail than has been previously attended to in the literature. Before doing so, however, it might be helpful to set the stage for the action project by demonstrating its intimate connection to human resource development and education programs characterized by work-based learning. First, I provide some conceptual foundation for work-based learning followed by a definition. Then, work-based learning is compared to the more familiar experiential approach to pedagogy. Finally, before turning to a full discussion of the design of the action project, the other critical component of work-based learning programs - the learning team - is briefly addressed.

Background on Work-Based Learning

Those of us concerned with management education live in two worlds. We speak two different languages. We occasionally come together and exchange views. Although we talk to one another, we are hardly aware that we are not sharing our conceptions of reality. We tend to part company thinking that we had a mutual exchange, but we then go back to our respective worlds for the most part unaffected by the so-called exchange.

We come from the two worlds of theory and practice, and with but few exceptions, we have not figured out how to merge them, how to speak in a language that not only informs each other but also advances our mutual preferences. Theory is depicted as the world of thought and practice refers to the world of action. Other depictions are less dispassionate. Theory is often construed by practitioners as impractical or as "academic" or "ivory-towerish." Meanwhile, practice is viewed by academics as banal and atheoretical. In normal science, the dominant approach to inquiry is represented by a strategic separation of theory, testing, and practice. Theoreticians are charged with developing hypotheses, empiricists take on theory-testing, and practitioners apply the results.

We are becoming more aware that knowledge through theory, for example, need not be split from our activities in the world. Indeed, knowledge (and especially its more dynamic agent, learning) is always occurring. It is part of our everyday life. As Wenger (1998) suggests, if we believe that knowledge is something that is stored, be it in a library or in a brain, then it makes sense to package it and present it without distraction in a succinct and articulate way to captive students. But we know that knowledge undergoes construction and transformation, that it is as much a dynamic as a static concept, as much a collective activity as individual thought (Lave, 1993). Abstract knowledge cannot help but be affected by circumstances, and frames of situations are at best inconclusive until verified by their effectiveness in action. Work-based learning, then, as noted at the outset, must blend theory and action. Theory makes sense only through practice, but practice makes sense only through reflection as enhanced by theory (Raelin, 1997).

Explicit vs. Tacit Forms of Knowledge

Work-based learning requires a new epistemology of practice which seeks to explore not just the explicit instructions and guidelines available in the workplace but also the tacit processes invoked personally by practitioners as they work through the problems of daily management. Explicit knowledge is the familiar codified form that is transmittable in formal, systematic language. Tacit knowledge is the component of knowledge that is not typically reportable since it is deeply rooted in action and involvement in a specific context (Polanyi, 1966). In other words, although individuals may be knowledgeable in what they do, they may not have the facility to say what it is they know (Pleasant, 1996). Ryle (1945) made the distinction between "knowing how" and "knowing that." "Knowing how" represents the tacit dimension which often eludes our capacity to abstractly frame our action.

Conventional learning methodologies tend to be theory-based classroom experiences relying on explicit knowledge. Unfortunately, they suffer the risk of leaving inexperienced students with the impression that eventual field problems can be nestled into neat technical packages. But, as Robert Reilly (1982) asks, can these students once in practice think independently, function without sufficient data or extrapolate beyond given data, change their approach in mid-stream, negotiate, and continually reflect and inquire? In a compelling example, he depicts the shock of a fresh MBA-trained manager who finds out that a product line divestment decision has less to do with marginal cost analysis than with personal affinity to the line on the part of the CEO who began his career with the brand.

Work-based learning is interested in both explicit and tacit knowledge. Heretofore, it was thought, especially by classroom epistemologists, that tacit knowledge couldn't be taught; that it had to be "picked up" by trial and error at work. However, knowledge creation has been depicted by Nonaka (1991) as transforming what is implicit into something that is explicit, especially through spirals of ongoing interaction between individuals, work teams, and organizations.

The Value of Reflection

Work-based learning recognizes that the workplace offers as many opportunities for learning as the classroom. Such learning needs to be centered around reflection on work practices. Hence, it offers managers faced with the relentless pace of pervasive change, an opportunity to overcome time pressures by reflecting upon and learning from their own action. It is no longer acceptable to offer the rationale, "We don't have a minute to think." Managers can no longer react to change; they must anticipate and work with it. Reflection with others offers the key to compete successfully in the 21st Century marketplace.

Work-based learning uses many diverse technologies but primary is the deployment of the action project and other interpersonal experiences, such as learning teams, executive coaching, and mentorships, which encourage learning dialogues. Learning dialogues are concerned with the surfacing, in the safe presence of trusting peers, those social, political, and even emotional reactions that might be blocking operating effectiveness.

Hence, combining theory and practice and explicit and tacit knowledge, work-based learning can be defined as a process of individual and organizational learning characterized by three elements (Raelin, 2000):

- a. It views learning as acquired in the midst of action and dedicated to the task at hand.
- b. It sees knowledge creation and utilization as a collective activity wherein learning becomes everyone's job.
- c. Its users demonstrate a learning-to-learn aptitude which frees them to question underlying assumptions of practice.

Work-based learning, then, differs from conventional training in that there is conscious reflection on actual experience. Fundamental to the process is the concept of metacognition (Meisel and Fearon,

1996) which means that one constantly thinks about one's problem-solving processes. It is not enough just to ask "what we learned," but also, "what does it mean or how does it square with what we already know?" Hence, learning can be more than just the acquisition of technical skills. It also constitutes the reframing necessary to create new knowledge.

Work-based learning is also distinguished from developing managers and executives through experience, such as through job rotation. In such programs, managers are often given a variety of so-called "stretch" assignments, often in a cross-section of operating departments in both line and staff roles, to season them and to prepare them for "general management." Unfortunately, these assignments, though often challenging, do not necessarily come with any consistent form of mentorship, nor is the assignee given much chance to reflect with others on the skills presumably being learned. Experience, in other words, tends to teach in private, reinforcing the notion that learning is done individually, not collectively, in organizations. Further, although trainees may have exhibited effective skills in their job rotation experiences, there is typically little opportunity for them to reflect on and process these skills and competencies, even when they were performed effectively. Hence, when confronted with new situations calling for the use of these same skills, they haven't learned sufficiently to know that these implicit skills can be applied (or not applied, as the case may be) in the new context.

Work-Based Learning vs. Experiential Education

Not only does work-based learning through its reflective focus differ from learning through experience, but in its devotion to real-world problems, it also differs from classroom experiential methods. Since managers are stakeholders in the problems which they attempt to solve, their real problems can become the focus of study. Hence, as participants they are challenged on these real problems and real risks, not on simulated risks conjured in fantasy organizations. The risks are real because the assigned project work can have an impact on the participant's career and present

position (Gibson and Hughes, 1987). Extant curricular devices which attempt to introduce a spirit of practice in traditional lecture programs - be they case analyses, action research through consultancy, field research and observation, or multimedia methods - though useful, often fall short in helping participants assimilate theory into practice or to learn how to challenge and reflect on their own operating assumptions. Hence, the action referred to in work-based learning is not temporary or simulated. Participants need to take real positions, make moral judgments, and defend them under pressure. Dealing exclusively with simulated events tends to defuse or abstract live conflicts. Cooperation typically is obtained where it otherwise may be impossible, and problems of an emotional or political nature get neatly analyzed into solutions. In a poignant defense of the case method, Michael Berger (1983: 332) ironically argues that the case method enables managers, "...unwilling to focus on their own problems for fear of political consequences later onto explore possible solutions, learn new concepts, and sound out one another's positions *without confronting the issues directly*" (italics added). What work-based learning as a form of management education tends to elicit, then, as opposed to experiential approaches or case analyses highly valued in North America, is managerial behavior not student behavior. Students derive knowledge not about management but about their own capacity to take action, or more simply, how to take action.

Learning Teams

Before elaborating on the design of the action project, it is important to briefly discuss another critical component in work-based learning programs, namely, the learning team. Learning teams assemble participants who as operating managers are working on action projects in their respective organizations. During learning team sessions, the participants discuss not only the practical dilemmas arising from actions in their work settings, but the application or misapplication of theories and concepts to these actions. The participants also receive feedback from their peers

on their plans and ensuing actions. Often, the participants will change their ideas and actions in light of the group discussion. Hence, throughout the process, there is constant questioning of one's values and one's theories with regard to their effectiveness in solving real problems.

Once in a learning team, participants seek the assistance of not only their peers but their facilitator whose role it is to guide them more on the process than on the content of their problem analysis and implementation. Typically, facilitators rely on the group itself to offer suggestions to members engaged in project quandaries rather than solve their problems for them. However, facilitators do provide resource suggestions and advice on learning how to learn. In this way, participants learn to reflect on experience and to bring out the assumptions brought to bear on their actions. They essentially move back and forth between actual situations and theoretical models which are built to understand reality in a form of "search-and-learn" process (Marsick and Cederholm, 1988). They thus acquire self-knowledge not only of themselves as persons but as managers within a context. This helps them clarify where they can make best use of their identified capabilities (Kotter, 1982).

In some programs, learning teams extend the feedback to the conduct of the participant in the group itself, thus serving as a basis for an assessment of one's effectiveness in a group setting. Participants may also develop personal development plans for personal and managerial change and share these plans with the rest of the group. Team members then discuss each others' plans, identify potential pitfalls, and suggest improvements. Occasionally, participants may even be called back together six to eight months later to report on the successes and frustrations in implementing their personal action plans. They may also provide updates on the status of their projects (Noel and Charan, 1988).

The Action Project

Arguably the central feature of any work-based learning program is the action project. Projects involve the participant in concrete action (as opposed to just analysis) in their sponsoring

organizations. The focus is typically on problems in current operations or opportunities for strategic improvement. As might be expected, not all organizational problems are solved. Moreover, proposed solutions may be deemed by management to be too costly in time or money. It is even possible that participants may realize that no quick solution is available. Hence, the experience tends to confront participants with the constraints of organizational reality, leading oftentimes to their discovery of alternative and creative means to accomplish their objectives.

The action project, then, is qualitatively different from a project which might be selected in a professional practicum. In learning highly refined technical skills, the professional requires some space and safe "practice" in order to try out developed aptitudes (Schön, 1987). Much of the experience of the practicum is under the guidance of a coach whose role is to help the professional learn the technical skills as well as the norms of behavior of professional practice. Management, on the other hand, is significantly more interactive, public, and, in fact messy than the professions, and thus cannot be adequately demonstrated in the safe environment of the practicum (Raelin, 1990). It requires a real-time environment which presents the participant with the pressures of the moment.

Since the relevant situation confronting the managerial participant cannot be easily replicated, the facilitator cannot teach in an anticipatory fashion. Moreover, in contrast to the simulated environment, where familiar theories, models, or techniques might help students work their way out of messy situations, in real life, often new theories and approaches must be developed on the spot to make some sense out of otherwise ill-understood situations (Lyons, 1991). The project can be preceded by both formal and applied learning modules, including cases or simulations, to provide a glimpse of the likely contingencies which might ensue in real life. Ultimately, however, participants must work on live problems with the help of their facilitator and peers. Any security must come from the organizational environment which supports learning, and consequently, which allows for failures on the road to personal growth.

Some examples:

General Electric's Executive Development Course is a month-long experience during which time promising executives assemble into teams to work on a specific assignment. The assignments vary by topic from year to year and although sponsors get a completed project at the end of the month, the real issue for GE's Leadership Development Center at Crotonville is the value of the learning experience more than the assignment per se. The way it works, according to Greco (1997), is half of the month is spent preparing for the project - making contacts, clarifying objectives, etc.- and the other half is spent doing the field work. At the conclusion of the program, the teams make their recommendations in a presentation to senior leaders and to the sponsors who provided the project.

General Electric's Crotonville has been a pioneer in action learning in the United States. Among its innovations in work-based projects was the preliminary detail it put into project development. Before plunging into any project, participants would receive briefings on pertinent market, customer, and financial information. Crotonville would also lay the foundation for the action projects by providing in the first weeks of the program state-of-the-art concepts in key substantive domains ranging from strategic marketing and financial planning to competitive analysis and organizational change (Noel and Charan, 1988, 1992).

Dupont's Leadership for Growth eight-week program, according to Director of Human Resources, Susan Mazur, starts with a week devoted mostly to classroom topics but makes room for participants to organize and plan action projects. Week two is spent entirely on project design and data collection and includes meetings with projects sponsors. During weeks three through six, participants are back on their jobs but may spend as much as 50% of their time advancing their project work. During week seven, participants reconvene for additional classroom sessions but spend about half the time putting the finishing touches on their project. The last week of the program is spent preparing and presenting their project recommendations to senior leaders and then debriefing the project process. Recently, the program was condensed to a full-time three-week

experience in order to reduce travel and program costs. In addition, a business simulation, formerly done in the first week, was canceled as the tools it introduced were found to be brought out more effectively in the work-based project.

In Cable & Wireless, Inc.'s Leadership Workshop, participants are drawn from seven countries and diverse functions to work on international projects sponsored by the highest level in the organization, C&W's Executive Management Team. Team members work on their projects over an intensive three-month period while continuing to work on their current jobs. One team investigated how to obtain optimum value from the company's global investment in training and development. Accordingly, they benchmarked Cable & Wireless' facilities against those of other multinational companies and of academic institutions, interviewed Business Unit training and development directors about their needs, and regularly canvassed the views of the company's top executives. Although this and other teams did not have all of their recommendations accepted, Linus Cheung, Chief Executive of Hongkong Telecom (a Cable & Wireless subsidiary) and a Leadership Workshop team sponsor, noted that even rejected recommendations "... were presented in such a way that they triggered informed debates on the issues which allowed us to make decisions on the way forward."¹

Having laid the foundation, we can now explore the key features to be taken into consideration in designing the work-based action project.

Project Choice and Operation

In order to replicate real-time conditions, it is normally advised that projects have strategic value to the organization or unit within the organization which is sponsoring the project. By strategic value, it is meant that the project contribute meaningfully to, perhaps even challenge, the goals established by the sponsoring unit. The project could entail an assignment that is already being done, but perhaps in a unique or more effective manner. Most projects are experimental in at least two ways: 1) they tend to involve doing something that has never been done before, and

¹ This paragraph, from a Cable & Wireless newsletter, is provided through the courtesy of David Ashton, former chief executive, The Cable & Wireless College.

2) there is no known solution to the problem or there are at least different opinions regarding how the problem is to be solved. Another way to look at project choice is to consider problems with solutions that depend upon any number of unpredictable circumstances and conditions that need to be surfaced during the course of the venture. An ultimate guideline is to consider projects that otherwise might have been contracted to a consultant.

Given this description, there can be no definitive list of project topics; projects need to be tailored to the individual unit sponsoring the endeavor. However, it is possible to list some prototypical topics to provide a flavor for the significance of these ventures. Projects, then, have entailed such concerns as:

- developing candidates for a merger or acquisition
- devising a marketing plan for a new line of business
- identifying logistical cost savings
- developing synergies across divisions
- integrating suppliers into the business plan
- demonstrating the social and economic trends affecting key markets
- combating private label competing products
- designing an integrated customer database
- streamlining the customer support process
- creating a shared business service center
- developing a knowledge storage and transfer process
- improving management of a company's patents
- streamlining an invoice processing and payment system
- enhancing the work-order process used by facilities management staff
- creating a strategy for a new business unit
- developing a plan for revamping or integrating service departments
- deciding whether to invest in a new technology
- integrating technology into work design and output

- engaging in cross-selling across business units
- fostering integration among business units to improve customer service
- developing community/corporate partnerships
- improving the corporate image of a company through a community-wide survey
- redesigning the human resource function
- streamlining the delivery schedule of a supplier
- enhancing company-wide communication using information technologies
- easing work-life conflicts through a comprehensive benefits package
- improving customer service through focus groups
- producing a strategy to improve sales performance
- enhancing the commitment of temporary workers
- devising employment alternatives to downsizing
- developing a balanced scorecard to evaluate an organization's practices

As can be discerned, action projects provide an opportunity to effect real change. In this sense, they afford challenge but through attainable goals. Milestones can be set so as to assess meaningful progress on these project goals. A useful approach is to generate action points at appropriate junctures, perhaps at learning team meetings, where the project might be discussed. Beaty, Bourner, and Frost (1993) suggest that action points be clear, specific, and measurable. That way colleagues in the learning team can assess whether, in fact, progress has been made in the interim. For example, if Randi were to suggest that she was going to expand the use of focus groups to assess client satisfaction at her clinic, that would not be as useful as saying::

We've been thinking about using focus groups for some time now, but at next Friday's planning meeting of the OD Team, I'm going to suggest that we pilot three focus groups using three different populations: a sample of clients, as originally planned, but also a physician team and the non-physician advisory group. The purpose will remain the same - how we're doing on each of the seven performance indicators in our Client Satisfaction Index - but we'll adapt the questions for the physicians and non-physician clinicians. I suspect Tom and Frank, representing these two clinician groups, will buy in since they'll be able to match what the

client's perceive as our strengths and weaknesses against the clinicians' perceptions.

Notice that with the above set of statements, members of the learning team will have specific items to follow up on at the next learning team meeting. They and Randi will also have a qualitative basis to determine her progress; i.e., how did the OD team, Tom and Fran in particular, respond to her suggestion to expand the focus group strategy, did they offer suggestions to change some of the questions, did they buy in to the idea of running a pilot, did they agree on the constitution of the focus groups, was a schedule set up, will and should Randi be conducting each of the sessions, and, in retrospect, does she still feel justified in having recommended a change in the original design?

The only way to have this type of productive dialogue is to be engaged in projects that are realistic as opposed to makeshift. Programs typically are designed to give participants the opportunity to learn from live experience, not from simulated experience. It is the confronting of unexpected occurrences consistent with real problems that underlies praxis, that component of epistemology that emphasizes learning through practical application. Consider the example of Brian Caie (1987), writing about his experience in a project-based program sponsored by the International Management Centre in Buckingham, the U.K. Brian had begun the implementation phase of his project, which consisted of introducing the so-called team briefing strategy into his company. He had gotten management committed to the process and had even begun training supervisors in its use. Then, in the space of a few months, his sponsor, the sponsor's boss, and the company president were all transferred out of the division. His new managers, though sympathetic to employee communications, felt uncomfortable supporting the team briefing approach since they played no role in its development.

Brian's project had to return to the drawing board for a subsequent relaunch. Nevertheless, Brian, in retrospect, reported that the crisis in his project led to the greatest learning from the experience. In his own words:

...it [the crisis] provided the opportunity to review the system, reflect on its shortcomings and improve upon the initial approach. The team briefing system ultimately put in place survives to the present day because of the care taken to implement it properly and the lessons learned in what became known as the pilot project.

The strategic value of projects cannot be overstated in the sense of their having impact on the direction of the sponsoring unit and, subsequently, systemically across the entire organization. They're also typically linked to a planned or ongoing change effort. Unfortunately, some projects are undertaken as planning or analysis studies. Once the analysis is completed, it is presented to an official who might decide whether to accept it or not. If the decision is "go," another individual or team might be assembled to work on the recommendations of the original project team. This form of project is not an action project, nor does it provide an opportunity for sufficient reflective practice for significant double- and triple-loop learning. Projects in work-based learning are best designed when participants know that their actions are potentially going to have an impact and thus need to be evaluated against normal, difficult operating standards. Planning studies often do not require the level of commitment that might lead to serious self and public examination.

There is also an element of scope to action projects that requires a good deal of time and concentration. Projects often involve participants in endeavors outside their own department and may require the support and commitment of other colleagues, perhaps to form a team, as a basis for undertaking the project on a useful scale. Some participants, particularly those who have not yet had strategic responsibilities, may not have had experience with projects of significant scope and time. They might be more familiar with projects which can be accomplished quickly or might produce short-term results. Working through the more ambitious action project in a deliberate manner, especially taking the necessary time at the outset to pose the question accurately, frame the problem, and collect data, elicits useful skills in strategic reasoning.

Another key question in project choice centers on whether the participant in the work-based program or the sponsor should ultimately select the project. If the work is to have strategic value, there may be some sympathy in having the executive sponsoring the activity decide which

problems need to be addressed or which tasks need to be done. On the other hand, learning is facilitated when it makes most sense to participants; hence there is an argument for letting the participants choose their own projects, admittedly within the constraint that they have real value.

One rationale for allowing flexibility in project selection is to provide an opportunity for participants to experience double-loop learning, as mentioned earlier. If there is not enough flexibility built into the project design, participants, though giving the executive sponsors what they want, may not arrive at a solution that gets at the root of an issue and may not produce much of a learning opportunity for the sponsors themselves nor for their organization.

Another argument on behalf of participant choice has been presented by Robert Kittrell of Leadership Solutions, Waltham, Massachusetts, who notes: "... those persons directly involved in any learning project, whatever it is, must be directly involved in identifying and articulating what is to be done." Mr. Kittrell offers two reasons for his contention:

The first one is the most obvious; people pay attention to and follow through on projects they have had a direct say in developing and articulating. This might be known as Ownership or Enlightened Self-Interest.

The second one is known as Personal Responsibility. It comes from our fundamental job as educators to enlighten people so that they are in a position to help themselves. This means challenging those we work with to identify, face, and address those core problems and/or challenges which keep them, or their organization, from advancing toward a worthwhile future goal or mission.

It is working to develop within them the courage to learn not only from what they are doing, but more importantly to question (not why they are doing what they are doing, but) the basis on which they have chosen as they have, and how the projects they selected connect to their hopes and aspirations for the future, be it personally or professionally or organizationally.

Where project choice ensues after the formation of a learning team, team members may have to decide on which problem or set of problems in the organization to focus. In this case, there are three questions which the members may wish to consider once they derive a list of possible projects (IFAL, 1996):

- "who knows" - which members of the team know, not only about the problem, but about the opportunities and inherent difficulties it will present to the team.
- "who cares" - who among the team and also within the organization feels sufficiently strongly about the issue to do something about it.
- "who can" - the team typically wishes to tackle something that will effect change or progress; hence, members need to be allied with senior staff who have both the power and motivation to sponsor and to endorse the change effort.

The issue of project selection raised here is critical in work-based learning, for it poses the question of whether the objectives/benefits of the program extend to the organization or to the individual. The obvious answer is that it needs to be both. The word "learning" in work-based learning, does not suggest individual learning alone. Through project work which stretches the boundaries of methods to elicit and then confront organizational problems, the organization learns new ways to examine its fundamental goals and processes. Nevertheless, individuals undertaking the project are not pawns in a system; rather they are unique individuals who wish to develop and to enrich their own professional and personal lives. Thus, projects require the imprint of human creativity. They should evolve as participants who plan and manage them evolve. They need not be overly predesigned. Morgan and Ramirez (1984) noted that "...the more one designs the process in advance, the less opportunity for self-organization according to the insights which emerge."

So the bottom line seems to be: keep the executive sponsors involved, make sure the project is of real value to the organization, but build in enough flexibility for not only participants' buy-in but also for their shaping of the project. According to David Ashton, formerly of Cable & Wireless College, this shouldn't be an onerous task since most managers and executives enjoy working on real stretching problems of direct relevance to business success. On the other hand, they do need clear rules and support to surface and reinforce their learning agendas.

Consider some examples: In Dupont's Leadership for Growth program, outlined earlier, Susan Mazur reports that meaningful results occur when senior executives are involved in but not necessarily sponsoring the projects:

In our process the senior executive team sets the theme and defines some of the parameters which the projects must include. The leaders of strategic business units and functions submit proposals for projects they are willing to sponsor. A team of about a dozen business unit and function leaders reviews and prioritizes the submissions and sends recommendations to the senior executives who in turn make the final selection. Six projects are chosen for each class and the class participants then rank order their preferences as the projects are described to them by the sponsors. In our initial class 90% of participants were assigned to their first or second choice. Some "tweaking" is done in order to achieve the desired racial, gender, and regional diversity of each project team.

In the PHARE program, a middle management action learning program funded by the European Union and run by the International Management Center (IMC) of Budapest, the choice of the project is seen as a two-way process with the consultant assigned to each project team having a critical bridging function. The CEO or top management team is asked to come up with themes regarding organizational change in the company. The project team must at least show how the project responds to these themes.

Project Presentations

The criticality of project choice and operation is matched by the importance of project presentations at the conclusion of the experience. Having worked on an assignment of value for a significant period, at least in the case of most projects, participants are given an opportunity to present their results. Although there are some cases where participants have lost energy by the conclusion of the project and are no longer motivated to present their findings, the typical scenario finds participants quite eager to make a presentation. The key questions on project presentations tend to be who should attend these presentations and how should they be done.

Who should attend: There is little question that the direct sponsors of the project should attend the project presentations, but there is also sympathy for having even higher-ups attend,

especially where the project has had a strategic impact on the organization as a whole. There are two constraints in having CEOs present, if they are not sponsors. First, the project may not have a direct bearing on their operation and thus they may not be an interested party. Second, executive presence may inhibit the presentation, causing it to look more like a briefing than a learning experience. This latter point relates to our second question.

How should they be done: Although the presentation of one's project should have a celebratory element to it, it is also best viewed as an opportunity to share one's learning from the experience as well as to present results and make recommendations. It is an opportunity for all members and related stakeholders in the work-based learning program to reflect on the experience as part of a learning community. Hence, there should at least be a balance between "show and substance." What needs to be avoided is glossing over project results that were less than satisfactory for fear of executive retaliation. On the other hand, participants should not completely avoid an element of "sell" in their presentation. After all, they have worked hard on their project and they want it to succeed. Part of the learning in the action project is knowing how to manage the political dynamics in the organization in order to give their project a good chance to move to the next level of full implementation.

In one of Public Service Electric & Gas Company's development initiatives called Leadership Is Real Work (LIRW), senior executives from the division sponsoring a project attend not only the formal project presentations but also sit in on a session devoted to individual and team learning. Executives from other divisions are also invited to the formal presentations where their area of expertise pertain to the substantive nature of the project.

Susan Mazur from Dupont, commenting on project presentations concluding the project-based Leadership for Growth offering, would have us recall that the projects are real, substantive business issues sponsored by high-level executives and take place outside of the participants' work area. She further notes that presentations are more effective to the extent that the presentation audience is project-specific. The way it has worked at Dupont is that the team collaborates with the sponsor to determine the appropriate make-up of the audience.

So, in terms of question one regarding attendance, Susan explains:

Initially, we planned for an audience composed of the project sponsor, one to three members of senior corporate leadership, and four to six global business unit leaders. As it worked out, one member of senior corporate leadership was invited and present at each presentation. Some presentations also included the sponsoring business unit's global leadership team, others included heads of business units likely to have an interest in the project team's recommendations. By getting the right audience, there is motivation to do a credible presentation. In addition, it is clear from the outset that the business unit leader is counting on getting the feedback.

In regard to question two pertaining to the nature of the presentation, Susan reports:

The expectation for both learners and project sponsors is that this work is about *both* learning *and* contributing to real business issues. Since a key part of this development process is about leadership's role in enabling individual and organizational development, honesty, dialogue, and reflection between the presenters and the sponsor (plus others attending the presentations) is essential. If the presentation teams suspect they are merely going through the motions, it will be obvious in the quality and depth of the presentations.

Project Composition

Projects may be initiated as individual ventures or may be staffed by a team of participants from the same company. Even if undertaken as an individual endeavor, the project may inevitably involve other people in the organization or external to the organization (vendors, customers, etc.). Oftentimes project participants will recruit others to form a team to help them work on a project, even though the other members may not be formally participating in the work-based learning program. Microsoft, for example, maintains an expert network that stores knowledge competencies and personal profiles to help teams find individuals with particular expertise necessary for staffing software development projects (Davenport, De Long, & Beers, 1998). Occasionally, the project might be initiated with the help of either internal or external consultants.

Another project variant is to have a team from the program actually engage in the project while also meeting as a learning team. The team may be constituted of employees from the same department or may be entirely cross-departmental or even cross-divisional. Cross-functional

teams are encouraged where practical because they expose participants to different ways of thinking and enlighten them to knowledge processes outside their own boundaries. An example of a cross-divisional team is the one organized through the University of Salford among five members from the George & Harding Group of Construction Companies in the U.K. Each member of the team is from a different regional company making up the Harding Group. Meeting for four hours once a month over the course of twelve months, the learning team members not only worked on their own personal development but also came up with many usable ideas for quality improvement in both their individual companies and for the company as a whole (McCrudden, 1998).

It might be noted that if the format is team-based, each individual must take responsibility to ensure that he or she is working on a specific component of the overall group venture. Otherwise, individual initiative and learning may be lost within the team effort. It is for this reason that some project exponents believe that individual projects tend to produce greater individual learning as compared to group projects.

I believe there is ultimately no best way to constitute a project team. There is perhaps a natural efficiency in having a team work on a project while also meeting as a learning team. Further, there is a benefit in having team members mutually observe and offer constructive feedback on each other's actual job performance. Reflections on plans, assumptions, and practices can be more spontaneous and immediately contextualized. However, it may not be practical for an organization to release an entire group to work on one project.

Hence, the scope of project activity must also be considered as a program feature. Not only must an organization decide whether to release a full team to work on a project, but it may need to decide how many projects to have going at any one given time. For example, it is possible to suffer "action project overload" (Tucker and Taylor, 1997). This can occur if management becomes distracted by the frequent requests for information, interviews, customer visits and the like which are associated with project requirements. For example, projects often send out members to obtain information from organizational or unit data banks or directly from top

management. Although managerial staff are generally happy to accommodate such requests, there are limits to how much distraction from one's current job one can tolerate. Since projects have been characterized as typically strategic in character, there is also a need to retain sufficient staffing to do the tactical and operating work of the company, especially in instances when projects are being undertaken on a full-time basis. Some of these decisions on project composition will depend on the size of the organization but also on its learning orientation.

Finally, a relatively new issue in project composition is the question of constituting "external" action projects, or projects made up of managers from different organizations. Such an approach seems to be very applicable at senior levels where top managers may not have anyone with whom to share personal and confidential problems. There is also a strategic side to external projects that give top managers an opportunity to discuss business topics of mutual concern, be it marketing strategy, distribution policy, or even mergers and acquisitions. Naturally, such project groups are careful not to put direct competitors together. Nick Holley, director of management development at Lex Service, and Harvey Bennett, manager for senior management development for the Automobile Association (AA) in the U.K., formed what they called an "external action learning set" made up of senior people from companies operating in a range of sectors, including the water, retail, and food industries (Arkin, 1996).

Project Location

A controversial topic in project development is whether the project should be conducted at the participant's very worksite or at a different location, typically in the same organization (there are also experiments in which someone may "volunteer" services for another organization, perhaps a non-profit agency). Although there tends to be immediate payoff for the work unit if the individual remains at his or her worksite, the opportunity for long-term learning for both individual and organization may be enhanced where the project occurs off-site or minimally alternates between settings. Yet the practicality of having a staff member acquire new skills and

ideas in the classroom component of the program and then bring them back simultaneously into one's actual work setting is hard to pass up.

Besides payoff and practicality, there is yet another reason to support project placements within familiar surroundings. This would be the case of staffing projects using different hierarchical levels, although project designers may wish to ensure that supervisors and direct reports not work together. Managers do not necessarily have the opportunity in their daily assignments to work with higher levels of management as equals. Complicated dynamics occur in this setting and can be instructive and even, at times, liberating to disassemble. For example, lower-ranking members might find an immediate impulse to defer decision making to the higher-ranking members, and the latter may be inclined to delegate the "work" to the lower-ranks (Tucker and Taylor, 1997). At times, it is also more challenging to work with peers with whom one is familiar than with strangers with whom one can start fresh with new roles, new expectations, and new assignments. The spirit of the project team should be to allow members to develop their own levels of responsibility and contribution apart from prior duties and ranks. Furthermore, discrepancies in commitment and participation need to be managed, regardless of past reputation or performance.

There are, on the other hand, a number of arguments to be made in favor of alternative or unfamiliar sites. Without the benefit of input from different cultures, we may develop what Hayes and Allinson (1998) refer to as "strategic myopia." This is a form of single-loop learning that goes only so far as correcting the prevailing mental models within the organization. However, we occasionally need to examine our underlying assumptions and principles in order to respond to strategic challenges in a new light. Hence, if one considers the places where people work to be "culturally ordered" (Lave, 1988), with their own unwritten rules about what's important, then working in a different location can encourage new ways of thinking about otherwise familiar problems and provide breadth of experience. Tyre and von Hippel (1997) found that engineers who went to sites to observe a problem firsthand learned about many

unexpected occurrences of problems that they never could have fathomed in their usual site, i.e., in the laboratory communicating by phone.

Working in alternative sites may also reveal unexpected insights or provide opportunities to reframe problems as knowledge and experience increase. Alternative sites can also help diffuse the knowledge that is embedded in one site into other parts of the organization. As one thinks about the use of alternative sites, projects can be categorized as performing one's already mastered job responsibilities in the new site or as assuming entirely new duties. In the former instance, the new unit obtains whatever skills and knowledge the participant transfers from his or her prior workplace, while the participant experiences the dynamic of adapting his or her typical job duties or even professional responsibilities to a different culture. The exercise of new duties in a different location offers the potential for literally "unfreezing" all of one's assumptions about work, releasing the participant to a totally new experience, both in terms of task and environment.

Project Administration Issues

Once project groups are formed, program administrators need to decide whether or not they should be funded. Some programs believe that funding should become a constraint on project development like any other constraint which the group has to overcome. If the project is to be considered worthwhile, the team might need to solicit resources from the relevant stakeholders, convincing them of its value. On the other hand, seed money might initially be needed to get the project off the ground. Worthwhile projects inevitably require expenditures, be they for travel, communications, survey work, report preparation, and the like. At Knight-Ridder, Inc., the large U.S. newspaper chain, project teams start out with a budget of between \$10 and 12 thousand. Knight-Ridder projects, however, have a 6-8 month duration, so there is ample time for teams to solicit additional subsidization (Reed, 1997). Citibank's Team Challenge projects operate with liberal budgets. For example, one project had its team members individually travel all over the world to determine if it made sense for each of Citi's country and business units to maintain a separate treasury to manage their funds. This particular project resulted in Citibank

centralizing its treasuries, an outcome that even with the extraordinary travel expenditures, according to CFO Victor Menezes, was "much cheaper than a management consultant" (Reingold and Bongiorno, 1997).

The duration of projects is often debated in the literature, but there is no optimal time frame. Much depends on the patience of corporate management to withstand participants' absence from their regular jobs in return for their project and managerial performance and learning. Some programs which run over two years can support lengthy projects of 6 months to a year, as in the case of Knight-Ridder; others can be quite short, as in General Electric's 4-week executive development program and Citi's month-long Team Challenge. Avon's Passport Program brings teams together for six weeks but spreads it over an 18 month period (Reingold and Bongiorno, 1997). The longer programs tend to provide more conceptual development and in-depth experience but suffer the risk of loss of participant intensity and/or supervisory support. When project teams congeal, however, there is oftentimes a reverse problem of managing their members' separation once the program is over. Administrators may be advised in this instance to keep them involved at least partially in implementation efforts, to plan reunions, and to expedite means to keep people in touch with one another.

Projects can also take on a life of their own once the program is over. In fact, full implementation of a project, once it has been completed through the program, may represent the highest form of success. It is an indication that the team's work has been so critical that its effort needs to be institutionalized within the unit or organization. Projects, then, should incorporate within their presentation a plan for full implementation of their findings and recommendations. Citibank's Team Challenge projects, for instance, typically end with a 30/60/90-day schedule. The team proposes some concrete steps that must be taken within these time frames in order to make their project recommendations actionable (Dotlich and Noel, 1998).

Where work-based learning programs are provided apart from academic accreditation, there may be some resistance on the part of participants to commit their learning and substantive outcomes to writing. However, sponsors minimally expect some report of recommendations from project

teams. If credit is given for project work as part of an academic qualification, normally a full report is expected that would meet the dual standards of academic rigor and workplace practicality. Besides the recommendations for action steps in the domain of the project, the report may also contain some conventional academic elements, such as a literature review and an accounting of the data collection methods used to undertake any research components. In the Boston College Leadership for Change program, with which I am affiliated, the project accounts for one-half of the qualification of 12 credits awarded upon successful completion of the program. Leadership for Change is described as a graduate level executive development program to enhance participants' individual, organizational, and societal leadership. There are ten criteria used in assessing the project work. They are presented below as questions posed to the participants to help them prepare their final project report:

1. Was there a clear statement of the purpose of your work? (e.g., did you furnish a rationale of the importance of your work to you personally, to your team, to your organization, or even to the broader social environment?)
2. Did you gather and cite a literature and other sources giving a background to your project and description of prior work in your area of interest? (e.g., did you attach a bibliography and make reference to it in the body of the writing?)
3. Was your methodology and/or intervention strategy appropriate for the task you set for yourself? (e.g., did you carefully describe the interviews you conducted, provide lists of questions asked, show the context for them?)
4. Did you make a coherent argument based on the information (data) you gathered? (e.g., do your conclusions follow logically from the evidence? Do your policy recommendations follow directly from evidence?)
5. Did the project make an impact on your organization or unit? (e.g., has something really changed as a result of your work? Did you include "bottom line" measures of cost savings or benefits which occurred as a result of project implementation?)
6. Did you use action learning in your work? (e.g., have you been a reflective practitioner, allowing what you discover to influence your work and to change you? Have you encouraged others to reflect on their own work, and to change, as well?)
7. Did you integrate theory and practice? (e.g., is it clear that you took information from readings and modules and used it in your practice and then, in reflecting on your actions, revised your theories?)
8. Does your project show innovative thought and expression? (e.g., does it contain rich concepts and creative, original ways of looking at problems?)

9. Is there strong evidence of your leadership effort and ability? (e.g., what obstacles did you overcome? Did you make meaning in a community of practice?)

10. Does the project as a whole make a contribution to the common good? (e.g., is there a rationale for your work that follows from, and expands upon, the model of social change we have been developing in this program?)

Most action projects are undertaken without an academic component; nevertheless, they should build in an evaluation component. Measures may be developed as per the business function in question. If the project was to initiate quality processes, to reduce downtime, to improve customer satisfaction, or to save on costs, then the measures should flow from these respective variables. It might also be advisable to collect data both before and after the project to demonstrate change and improvement. If the data can be converted to quantitative metrics, the measurement process can proceed in a straightforward manner.

Consider as an example a project in the domain of distribution (Kelly, 1993). A new system is to be put in place to cut down on the number of wrong deliveries from a retail distribution warehouse. The costs associated with wrong orders can be quantified using such indicators as:

- cost of picking up the wrong order and redelivering the correct order
- staff time in stores and at the distribution center reorganizing the order
- time attributed to sales staff in pacifying angry customers
- time calculated for the finance staff to reinvoice and issue credit notes

Using data of this sort can lead to explicit calculations which can demonstrate the benefits from the project. However, less obvious, non-quantitative measure should not be overlooked in the measurement system. Some benefits, such as customer goodwill or staff morale, though not as readily assessed, should be incorporated. There may also be hidden costs in a project of this nature that should be accounted for, such as resistance from critical stakeholders or loss of staff commitment if there is pressure to achieve immediate targets. Finally, participants' learning should

be assessed to the extent possible using such proxies as subsequent job performance, team behavior, career advancement, or the confidence to delegate more effectively.

A measurement system should be designed initially based upon the goals of the project and then adapted as the project unfolds. Any decision regarding the number of measures should follow the well-known canon that one should measure everything that matters and not much else! The key is to provide project stakeholders with timely and reliable information which would be relevant to the ongoing development of the project. Intangible factors, such as morale and satisfaction, should be included along with standard performance indicators. In some instances, unobtrusive measures will need to be devised in place of the less tangible variables. An example of an unobtrusive measure is growth in resources attached to the project over and above its budgeted expenses. Successful projects generate support which can be measured in the amount of resources, physical and human, which are allocated to it. Another unobtrusive measure, mentioned earlier, is the survival of the project beyond the work-based learning program. This measure suggests that successful projects take on a life of their own.

The Challenge of Action Projects

Although projects, if structured well, can have a meaningful impact within the organization, they can, at the same time, cause confusion and resentment. Knowing some of the pitfalls of action projects in advance can help program administrators plan them to achieve salutary ends.

By their very nature, action projects are a challenge to the status quo. All affected management, frequently the entire organization, need to be apprised of their unique nature. Even if well publicized, however, there is an inevitable threat to individuals whose roles or responsibilities might be challenged by the recommendations forthcoming from the project. Hence, it has to be made clear at the outset of any work-based learning program, involving projects, that although the program will not threaten anyone's employment security, it may result

in different ways to organize the work of the organization. Further, most projects are not typically designed to re-engineer anyone's current job; rather, they tend to be future and change-oriented activities that affect entire operations and strategies. They are what might be termed, "white space" endeavors. Nevertheless, since they look at ways to anticipate and cope with future organizational challenges, they may indeed invoke risks to present operating conditions. In the end, they are designed to help everyone in the organization prepare for the future.

This raises a larger question: work-based learning may become a political undertaking in that it could very well bear on questions of power and social relationships in the organization as a whole. Are executives capable of making themselves vulnerable to unexpected answers? Do they want the entire organization, including themselves, to be involved in learning? Participants who have experienced work-based learning tend to report having gone through a much deeper and holistic exercise than ever anticipated. In a way, as Weinstein (1995) warns, work-based learning can even be considered subversive within the context of conformist organizations because of what it values, i.e.:

- it examines everything
- it stresses listening
- it emphasizes questioning
- it fosters courage
- it incites action
- it abets reflection
- it endorses democratic participation

At the same time, one could argue that projects should be managed in a way that leverages whatever the prevailing culture allows. For instance, in learning how to manage effectively, one needs to learn how to sell a project proposal both to one's peers as well as to senior management (Peters and Smith, 1997). Further, although projects might start off as local ventures, the outcomes of work-based learning flow into the surrounding environment. Participants begin to question things beyond their local context.

Projects, at least if they are to have strategic impact, do not operate in a vacuum. Indeed, work-based learning is not typically designed as a one-time, individual learning opportunity. Most

designers see it as having organizational learning implications. In that sense, Weinstein may be correct; it can be subversive in organizations which expect conformity to a party line.

Projects in work-based learning are most effective when participants are given responsibility to pursue and follow through on the problems that they confront. Project success, when defined as a learning opportunity for the sponsoring unit or organization, is dependent on releasing the talent and experience on the part of the individual or team involved. Projects gradually take on a life of their own and, at times, even diverge from the question originally posed to the team. What tends to be consequential to participants is a sense that no matter what they discover in their study, they will have the opportunity to see the project through to its natural conclusion, even if it means challenging the status quo. Project recommendations need not be automatically accepted. Team members just need to know that their recommendations will get a fair hearing by their sponsors even when they conflict with existing norms and plans. Work-based action projects, then, virtually require an organizational culture of risk-taking and openness that permits occasional surfacing of ineffectual rules and practices. There is no place for reflective practice in a closed culture; work-based learning works best when all organizational members, including those at the top, agree to submit even their governing values to scrutiny.

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Biographical Sketch

Joseph A. Raelin (Ph.D., SUNY at Buffalo) is Professor of Management at the Wallace E. Carroll School of Management at Boston College. His research and consulting activities have recently centered on executive leadership and learning. He is author of the book, Work-Based Learning: The New Frontier of Management Development (newest addition to the Addison-Wesley OD Series, published by Prentice-Hall, 2000), from which portions of this article were adapted.

Articles

Paul M. Swiercz, Ph.D, Editor

We have all asked the question: "Why do organizations employing so many intelligent people continue with strategies that are obviously not working, fail to take actions that are clearly called for, or repeat their mistakes, over and over?" In other words, why do organizations (managers) fail to learn? Could it be that we are still lacking the tools necessary to help managers translate experience into learning? Those predisposed to answer this last question in the affirmative tend to be proponents of action learning. They believe that managers can learn, if coached properly, to take effective action by reviewing and interpreting their everyday work experiences to discover what they have learned.

Professor Joe Raelin of Boston College is a believer in action learning. Not only that, he is a demanding student of the art of action learning. In his paper "The Design of the Action Project in Work-Based Learning," Professor Raelin provides both a comprehensive review of action-based executive development and a roadmap for constructing a team-based, project-focused, action-learning program. Those readers working in organizations with tight executive development budgets, staffed by executives too busy for development, will find this article invaluable.

The second paper in this issue isn't about action learning per se, but it is about how organizations adjust themselves to a changing external environment. In their paper "Organizational Diplomacy: The Bridge for Managing Diversity," Jacqueline Gilbert of Middle Tennessee State University and John Ivancevich from the University of Houston ask readers to confront the continuing challenge of workplace discrimination. They remind us that even after nearly four decades of intentional effort, much remains to be done. Using the results of their fieldwork in 10 high-profile organizations, the authors explore some of the causes and consequences of superficial commitment to diversity, which they term "pacification." In addition, they propose a mechanism designed to aid organizational efforts to deal with increased heterogeneity. Their adaptation of a concept from international diplomacy provides an interesting and insightful new perspective on diversity challenge.

The final paper in the articles section, "Understanding Reactions to International Mobility Policies and Practices" by Victor Haines of the University of Sherbrooke and Tania Saba from the University of Montreal, uses survey responses from 328 respondents to report on the relative effectiveness of 30 popular expatriate policies and practices. In this era of globalization and widening international markets, more and more organizations are faced with the challenge of moving business leaders from one country to another. The authors' effort to examine empirically the fit between corporate benefits and employee preferences is informative and sometimes surprising. This article will be of particular interest to those organizations struggling to craft effective programs for a growing and demanding expatriate workforce.