

Action learning applied in health and social care partnerships

Introduction

This paper summarises the learning from a three-year project, jointly funded by the Scottish Social Services Council (SSSC) and NHS Education Scotland (NES), to apply action learning in 31 health and social care partnerships with the aim of improving leadership and collaboration in the context of health and social care integration. The emerging findings confirm the importance of investing in the “softer” elements of managing change.

Key findings include:

- the greater the buy-in from senior management, the more likely the organisation is to succeed in developing workable solutions
- in the context of the significant change that integration brings, creating space for a different kind of communication helps improve real outcomes
- skilled, preferably external, facilitators are required to disrupt conventional management behaviours and entrenched positions
- action learning addresses the reality of a situation, not an idealised fallacy
- just three days full-time equivalent (FTE) is enough to make a difference
- the reflective, authentic exchange that action learning enables builds trust, relationship, understanding and communication. These are essential elements in progressing partnership working to improve integrated services.

Even where partnerships have been approached positively, conventional management behaviours and meetings are based on agendas that are at best separate and often conflicting. Health Board, Social Services and Third Sector staff report they often experience cultural differences as a basis for “them-and-us” blame conversations. While most leaders recognise integration is inevitable, few have been clear about how to make collaborative progress, or about how important it is to change approach and initiate a different conversation, let alone how to do this.

How did the project work?

The three independent facilitators who ran the project used the action learning structure as the basic meeting protocol for the health and social care partnership groups they worked with. They also applied a flexibility that responded to the needs and dynamics in the room:

- action learning enables the group to connect as people, not just roles

- the group (usually eight to ten people) collectively decides its agenda at each meeting. This is created from individuals' headline "bids" for group time to explore their personal version of the shared challenge
- action learning has a discipline that ensures active listening to the issue owner's full story, without interruption
- feelings and sensations are also used as data (typically overlooked)
- insightful open questions help the group understand the situation more fully, before diagnosing the issue. Skilful questioning can uncover hidden assumptions and highlight the unnoticed, making unexpected, often creative connections
- unusually, the owner of the issue then sits out and observes while the group works on their behalf to develop options. This provides a rare opportunity to get an outsider's perspective on one's own situation
- the issue owner then rejoins the group and together they formulate an action plan that will work for them
- two or three issues are explored in this way and the group ends its session by reviewing its learning and identifying how it might develop at the next session.

Key message: "Keep it simple".

The simplicity of this intervention is striking:

- an external, skilled facilitator creates a confidential, safe space encouraging authentic and reflective interaction over a short period (three days FTE spaced over three to five months)
- the format for meeting and communicating should be different enough to unbalance existing patterns and habits
- group members are nominated by a senior sponsor(s) and agree dates to commit to working on their most intractable ("wicked") challenges
- the participants control the agenda, agree confidentiality and authorise the facilitator to direct the conversation. They hold one another accountable for their action plans
- the group's work is meshed with organisational and partnership objectives and, where appropriate, senior managers contribute to initial and/or final sessions.

Feedback

Consistent messages from both short-term and follow-up evaluations (six to nine months later) made over the three years reinforce the view that action learning can be an effective tool which enables different, more authentic conversations outside formal structures and which contribute to progress. Such conversations strengthen relationships, trust and the quality of communication and understanding between individuals, which in turn, logic would suggest, contributes to identifiably improved outcomes from joint leadership.

While not a solution to dysfunctional relationships or game-playing, honest commitment to engaging in shared purpose in this facilitated environment does promote real partnership working.

Participants also identified that:

- in this facilitated space they experience a psychological safety enabling more authentic exchange
- taking time and space to reflect together at first feels awkward but they quickly recognise the importance of tackling the intractable or chronic issues that are normally and understandably avoided in business meetings
- they develop leadership in such “wicked” issues by investing time in getting past the symptoms to the systemic. This does not lead to easy solutions, but builds enough shared ownership of the challenge to collaborate in finding steps forward
- Sometimes simply being understood can bring momentum to collaboration.

Naming and working with the situation as it actually is, as opposed to the fantasy of what it should be, is key. Additionally, this work requires participants to have time away from their normal work. It therefore requires authorisation from the top of the hierarchy who also need to recognise the importance of the process. Where this is not provided or is tokenistic, the momentum is noticeably impeded.

What is the key learning?

Those partnership groups who have participated view their experience highly positively. More than half bid for a second tranche, and because not all partnerships took up the initial project offer, eight of the 31 health and social care partnerships were able repeat the process with different issues.

Unsurprisingly, the more senior the representation within the group, the greater their effectiveness. However, key senior absences cannot be rectified by those below them who attend. They can only mitigate some of the barriers to progress. Where key senior people do not participate, the more junior members are at the very least able to identify the real basis of power within their organisational systems. Attendance, whether by CEOs or team leaders, is never easy in the face of conflicting priorities. However, it is noticeable that participants make great efforts to be part of the meetings once the return on investment is experienced.

Follow-up shows that while some groups have found ways of continuing to meet like this, so far this has only worked with middle or junior managers. It appears that the hierarchical behaviours of management meetings may be harder to shift without external, skilled facilitation. Additionally, participants have frequently applied aspects of this way of meeting to their leadership of other meetings with

noticeable benefits. They highlight individual development, citing behavioural change.

It is clear that to get beyond the habitual patterns of interaction imbued by conventional management behaviours and create the confidential space for a more authentic conversation, a neutral, skilled, third-party facilitator is required. Psychological safety is first established by the facilitator, then reinforced incrementally by the group. Where the facilitator is external, this both addresses inhibitions related to hierarchy and brings the neutrality required to enable all contributions to be heard and valued.

An action learning approach changes the relationship dynamic and the quality of communication to a more egalitarian, less hierarchical footing. This encourages an honest discussion of what the issues actually are and the voicing of what has previously been avoided. Confronting the difficult reality paradoxically frees up finding ways forward. Progress is based on reality rather than cherished fantasy or defensive assumption. While voicing "what is" can feel risky, authenticity provides a firm basis for taking responsibility and credible action.

The content of issues explored was both varied and confidential, but consistent patterns emerged: exploring assumptions about each others' cultures, values or ways of operating; testing or piloting solutions; refining approaches that work or show promise; testing boundaries over responsibility and governance; dealing with difficult individuals; applying political skills; and testing assumptions and understanding.

This project also demonstrates that action learning can be used more flexibly than has conventionally been the case. Existing teams with chequered histories and those who manage another participant are not usually encouraged to work in the same action learning set. While this is not straightforward, when approached with flexibility and creativity, action learning can be used effectively for progressing these and other complex situations.

The time required from the facilitators for pre-meeting engagement and relationship building with the key partnership representatives has consistently been underestimated in the project timings. It often took up to six months of work prior to the first meeting. However, this groundwork helped ensure the objectives were linked more closely with senior manager authorisation, local organisational development personnel and local strategic plans.

Conclusion

The impact of clear purpose in expediting change is demonstrated where integration is focused on outcomes for the people receiving services rather than on structural, organisational or power issues. However, these need to be navigated. Function is a more rewarding focus than structure.

The unambiguous conclusion of participants is that this action learning process has improved communication, authenticity, reflection, trust, understanding and relationships in their partnership groups. These apparently softer outcomes impact significantly on progress and on measurable outcomes.

“A difference that makes a difference” (G. Bateson)

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