Learning about Reflecting on Knowledge: An Approach for Embedding Reflective Practice in an Action Research Team

'By three methods we may learn wisdom: first, by reflection, which is the noblest; second, by imitation, which is the easiest; third, by experience, which is the bitterest.'
Confucious (Chinese Philosopher)

Introduction

The Impact and Learning Team (ILT) is interested in how communication of research brings about change – in particular, what happens when people and technology mediate between researchers and decision-makers. We use the term 'intermediary' to describe people and technology acting in this way. We think they play a critical role in making knowledge accessible, relevant and responsive to demand.

In the ILT, we are simultaneously practitioners and researchers of the intermediary domain. As practitioners, we work with people who play an intermediary role at the planning stage, at the delivery stage and at the reflection stage of their work to help them to take an outcome focus, to learn from existing knowledge, and to become more effective through reflection. We are deeply committed to continuous improvement and we believe that individual and group reflection can support this.

As researchers, we want to learn about and test the ingredients for effective intermediary work and to truly understand its impact, and the limits of its impact. In January 2011, we formalised our research agenda by designing a set of research questions to shape and steer our work. These questions included things like: what are the features of an effective intermediary? How can we measure the impact of intermediary work? We knew that to answer these questions we would need to draw on our collective knowledge and learning from a range of sources – our own experiences, existing academic and grey literature, and the insights of our peers. And we also expected that, like other practitioner-researchers, we may find it difficult to prioritise the research element of our work as practice pressures took over. We wanted a disciplined, manageable and effective process for documenting our knowledge journey, for drawing together different forms of knowledge on a regular basis and for helping us to learn as a team. We came up with the Learning Lab process to meet these needs.

In each Practice Paper published, we share our experience and learning. We are presenting ideas that we are exploring and that others in the intermediary sector might like to explore.

Our experiences contribute to the body of knowledge, but rarely if ever contain incontestable insights. This paper should not be read in isolation, however, and should be seen as complementary to other work conducted on related issues of capacity development, knowledge management, and policy influence.

The knowledge and information intermediary sector comprises those who seek to improve flows of knowledge between actors in decision-making and change processes in order to generate better development outcomes. Intermediaries act in a range of ways: enabling access to information; helping people to make sense of it; and facilitating connections that enable knowledge to be shared between stakeholders. It is a practice sector which cuts across other sectors.

We think the Learning Lab format may be useful for other practitioners and/or research teams who are short of time and dedicated to learning and improvement.

What is a Learning Lab and how does it work?

In brief, a Learning Lab is a self-facilitated process for group learning. The Learning Lab approach is based on an appreciation of reflective practice and principles of action research, as well as a deep appreciation for varied forms of knowledge.

Reflective practice is 'the capacity to reflect on action so as to engage in a process of continuous learning', which, according to Schön (1983), the originator of the term, is 'one of the defining characteristics of professional practice'. In ILT we are strong advocates for reflective practice and we use a range of tools to promote structured individual and group reflection at critical points in a project cycle.[1] We find that most influential models for reflective practice are best suited to drawing out insights after a specific shared experience or event and focus primarily on experiential knowledge rather than facilitating the drawing together of knowledge from a range of sources (e.g. Kolb's Reflective Model 1984; Gibbs' Structured Debriefing 1988; Johns' Five Patterns of Knowing 1995).

Action research has been described as 'a flexible spiral process which allows action (change, improvement) and research (understanding, knowledge) to be achieved at the same time. The understanding allows more informed change and at the same time is informed by that change' (Dick 2002). At its core, most influential action research models employ a cyclical approach, described by Kemmis and McTaggart (1988) as plan, act, observe, reflect; and then, in the light of this, plan for the next cycle. We find that this approach is best suited to team working, where the researchers are all trying to tackle similar problems through their actions, and where the practitioners work is also cyclical in nature.[2]

Both action research and reflective practice models are primarily focused on the insights we can draw from the actions we have taken. Our particular situation called for a learning process that would encourage us to reflect on what we 'know' rather than what we have 'done'. We expect that much of our knowledge will come from our experiences, but it will also come from other sources, including ethnographic observations of 'the sector' (ours' and others'), experimental studies (ours' and others') and theories/ideas/hypotheses that are proven or unproven (ours' and others'). Also, we needed a process that was not linked to an action cycle, as our work often does not provide us with opportunities to immediately test what we have learned and our research questions do not naturally link to particular points in a project life.

As such, in January 2011 we formulated the Learning Lab approach and refined the format over the following 18 months.

Describing the Learning Lab process

Venue: We conduct our Learning Labs in a quiet space with sufficient room for participants to: (a) move around and write simultaneously on 2–3 flip chart sheets and (b) sit comfortably for an open group discussion. Sometimes a Learning Lab is held in our shared office space; sometimes we use a meeting room. The important point is that we use a space where we can 'close the door' on other conversations and distractions.

Equipment: A Learning Lab requires minimal equipment. We use 2–3 sheets of flip chart paper and 4–10 fine marker pens (enough for each person in the room to have one each). As the process is not facilitated, we have found that it can help to have a clock in the room that everyone can see.

Time: The full process takes three hours. *No preparation time or follow-up time is needed – we think this is one of the strengths of the Learning Lab format for busy practitioners.* Ideally, the three hours should be in one uninterrupted block, perhaps with a brief comfort break if needed. We hold our Learning Labs in the afternoon, and on the same day each month. We strongly encourage participants to attend for the full three-hour session or not at all, rather than allowing people to arrive late or leaving early as this can disrupt the session. The important point is to choose a time when participants are least likely to be distracted (e.g. by impending deadlines, personal commitments, or other activities).

Participants: The process described here is suitable for a group of 4–10 people. A modified process is needed for larger groups to ensure that everyone has a chance to contribute.[3] Because we are not reflecting on a particular shared experience, it is not important for participants to all come from the same team. However, in our experience participants have always shared some common ground in their work; either working in a similar field (e.g. people working in research communication or the intermediary sector), or who are interested in similar methodological issues (e.g. an interest in theory of change or learning processes). Our hunch is that the Learning Lab process would be less successful for people with no common interest, although we have not trialled this scenario. Furthermore, we think

participants get more out of (and put more into) the learning process when they:

- Have an open and enquiring attitude, are willing to challenge, debate and discuss;

- Believe that everyone has something to share and contribute, are willing to listen and reconsider their positions/ ideas;

- Accept that this is an emergent process that might not lead to a concrete output, people thinking 'what's the point of this' are not likely to benefit as much;

- Trust each other as equals, or at least where big power differentials between participants do not mean that certain people are able to talk without being challenged.

Roles: The Learning Lab process is not led by a facilitator; all participants are expected to take equal responsibility for contributing, leaving space for others to contribute, time keeping and generally directing the session. We think this is important for encouraging people to own their own learning. If new participants are being introduced to the Learning Lab process, we describe the process and shared responsibilities to them before we start and then model the process in practice. In this situation it is helpful for the group to include several participants who are familiar with the Learning Lab format. Participants are asked to take turns taking on the role of 'scribe', with one scribe for each topic discussions (as below).

The Learning Lab in action: The three-hour session can be broken into five stages.

1. Set the agenda (10–15 minutes)

Identify 2–3 topics that participants would like to 'learn' about. The topics could be drawn from previously established research questions, a project theory of change, or simply generated by participants at the start of the session.[4] Each topic is written at the top of a flip chart page in the following format 'What have we learned about...?' and four prompt questions are recorded as follows:

     a   What do we know

     b   What do we suspect

     c   What resources/tools/literature already exists?

     d   What don't we know/do we want to explore?

The four prompt questions emerged over time. We find they help to encourage participants to draw knowledge from a wide range of sources (including, experience – Qns a and b – observations – Qns a and b – and existing literature – Qns a and c), to distinguish between proven (Qn a) and hypothesised (Qn b) insights, to contain the tendency to generate yet more questions (Qn d).

If the topics are generated in advance of the Leaning Lab, use the first 15 minutes to ensure all participants have a clear understanding of what the questions mean and how they were generated. If participants do not understand the questions, do not think they are relevant to their work or their experience, or if participants think they do not have anything to contribute, they might have difficulty engaging with the rest of the Learning Lab process.

Document what you know (20–30 minutes depending on the number of topics).

Each flip chart is placed on a table in a different part of the room. Participants move between the topic sheets documenting their responses to the questions in silence. Conducting this part of the session in silence is challenging for some people. We think it is valuable for individuals to reflect on their own experiences and form their own views before they share these and listen to others.

2. Participants should look to many sources for inspiration:

     a.   Experience – their own experience in work or other settings;

     b.   Literature – things they have read about this or a related topic;

     c.   Discussions – with colleagues, friends or communities of practice;

     d.   Observations – of other people, other organisations or other projects.

It can be tempting for participants to generate a lot of hypotheses and questions during the silent stage of the session, especially if they have an inquisitive mind or do not have a lot of experience in the topic under scrutiny. While hypotheses and new questions can be thought-provoking in discussion, the emphasis here is on taking stock of what is 'known' rather than what is 'unknown' and participants should try to limit the number of new questions they put forward.

The topic sheets act later as a centrepiece for discussion, a record of current collective knowledge and a memory jog for the scribe. Participants should try to keep their assertions brief but clear, and wherever possible they should provide short examples to back up their assertions.

When/if participants run out of ideas during the silent stage, they should spend time reading what other people have written, which may prompt new ideas or examples of their own. It is ok to disagree with a point made by another participant, in which case counter-examples are important.

Why is the silent reflection so important?

S. Batchelor

When a verbal discussion is held in a group, the path of the narrative can twist and turn but is basically linear. Point follows point. A point is made which is either reinforced or, if there is disagreement, a counterpoint is made. In verbal discussion if a point provokes a slightly tangential thought either that point is spoken aloud or 'the moment has passed' and is forgotten. If it is spoken aloud then it may be taken up by the group and the discussion continues along that tangential path; or it is spoken and ignored. In some occasions a discussion might have been going down one path, and is brought back to a junction by someone saying – 'If I can just follow up on something John said just now…

A verbal discussion forces us to think along certain paths. We use the external stimulation of the previous sentence to prompt our own contribution to the discussion.

Silence is the freedom to explore a landscape in your own head. Someone may have written something on the paper that prompts a thought. Instead of that thought being overrun by a discussion, the thought can be reflected on and documented on the flip charts. The flip charts are a way for the non-linear narrative to take shape.

There is a body of work on learning environments that picks up on this idea of non-linear learning. Most commonly it is applied to the new digital learning platforms and studies have been conducted on non-linear navigation within e-learning educational material; i.e. that 'Unit 2' might be undertaken before 'Unit 1'. The research suggests that different cognitive styles respond differently to non-linear learning (e.g. Chen 2002). For Chen and others studying this non-linear processing, the cognitive styles are defined by 'field dependence and independence'. Field dependence suggests a cognitive style that tends to rely on information provided by the outer world, the frame is set by an external prompt. In contrast, field-independent people tend to depend on their inner knowledge and analyse problems all by themselves, without reference to the frame.

Our hypothesis is that by giving silent space for the initial capture of information and experience, that those who are field-independent thinkers, or tend to analyse problems by themselves, have space to draw from their inside knowledge. At the same time, the field-independent thinkers do have some external prompts on the flip chart from which to draw and create their own thoughts. It is a process that draws in people with different cognitive styles. The subsequent discussion then allows all to join together to share and develop ideas in the 'normal' discursive style.

3. Discuss and debate (30–45minutes per topic, depending on the number of topics).

Identify one scribe for each of the topics. Take the topics in turn, and allow 30– 45 minutes per topic for a self-facilitated, free-flowing discussion. We encourage participants to start by familiarising themselves with the range of points written on each topic and to ask any clarifying questions. Sometimes it helps for one person to read the flip charts aloud, especially where notes are barely legible. As the discussion develops, participants should avoid highlighting only their own points. Think about:

> a. asking for clarification of points made by other people;
>
> b. challenging points you do not agree with;
>
> c. creating links between points;
>
> d. expanding on points to generate new ideas;
>
> e. providing brief but concrete examples to support or to challenge.

While there are often links between ideas on different topic sheets, we try to keep the discussion focused on one topic at a time. This helps to ensure each topic is given equal space for consideration.

4. Wrap it up (10 minutes)

After all of the topics have been discussed and debated the group should consider whether any additional outputs should be produced or additional actions should be initiated. Some examples of additional outputs and actions are discussed later in this note. It is not the intention that a Learning Lab will generate additional outputs/activities but if these do emerge they will need to be resourced accordingly.

5. Write it up (30 minutes)

The designated scribe for each topic uses the final 30 minutes to write up a basic summary of the flip chart and discussion for each topic. Everyone else 'rushes off' early, usually using the extra 30 minutes of free time to catch up with their emails and other business before the end of the working day. We strongly recommend that scribes do the write-up in these last 30 minutes of the sessions while the experience is still fresh in their memory and while (in theory) they do not have other commitments to attend to.
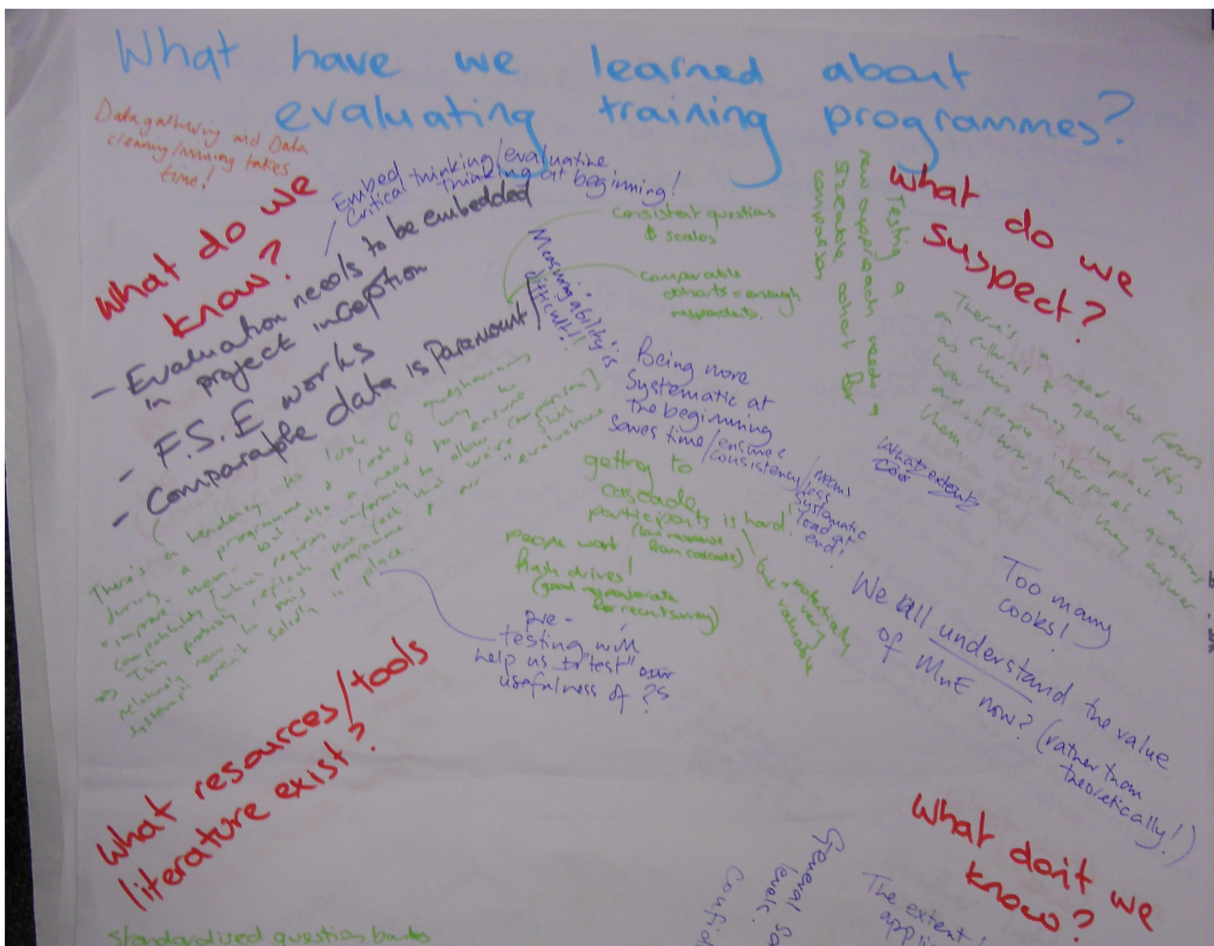
Outputs: The main focus of a Learning Lab is 'knowledge' and the main output that is generated is a record of that knowledge at a point in time. At a minimum, a summary of each Learning Lab topic should be written up in a form that can be shared with participants. It should be detailed enough to be meaningful for those who took part in the discussion, but not so detailed that it requires longer to write up than the 30 minutes allocated within the Learning Lab format. We often include a photo of the topic sheet and only type notes of the debate and discussion. This can cut down the write-up time, and the photo acts as a useful visual memory jog for participants.[5]

As mentioned above, other outputs may emerge from a Learning Lab, although we think these should not be predefined. We think that predefining the outputs may have a negative effect on the quality and direction of discussion by restricting it to one area. Also, these outputs are additional to the Learning Lab process and they need to be resourced accordingly. Some additional outputs that have emerged from ILT Learning Labs include:

- Blogs (for instance www.impactandlearning.org);

- Concept papers/practice papers (for instance other papers in this series).

Participants may also identify additional actions or new projects from a Learning Lab discussion. As with outputs, these are additional to the Learning Lab format and resources need to be considered. Some examples include:

- Communicating ideas from the Learning Lab to other staff;

- Developing a new project to investigate an outstanding question;

- Undertaking/commissioning a literature review.

What value does a Learning Lab generate?

Establishing and documenting what is already known, and not known

At a minimum, the Learning Lab process generates a record of a group's knowledge and knowledge gaps. The knowledge that can be accessed and shared in a Learning Lab is limited to the experiences, observations, reading and ideas held by the people in the room. For this reason, the Learning Lab is good for establishing what experience and knowledge on a topic is held by a group, this can include personal experience or knowledge of relevant tools, literature etc. Likewise, a Learning Lab can help to illustrate to a group the areas where they have very limited collective knowledge. Or where their collective knowledge is mainly drawn from one type of source: based on experience or literature, for example. Documenting what you know and how you know it is useful for researchers and practitioners who want to track their knowledge over time, perhaps as a data source for research and evaluation, or to make their knowledge more accessible to others.

Sharing knowledge within a group

Further, the Learning Lab is useful for sharing experience and knowledge with others who are present. It is often the case that participants will have varied levels of knowledge on a topic or will draw more or less of their knowledge from experience, observations or literature. Having a common knowledge base can be beneficial for participants who are working together – even if they do not agree they at least have a better understanding of the knowledge underpinning a colleague's approach.

Generating new knowledge and insights around a topic

Taking time to share our respective knowledge and the discussion that ensues has been very effective in generating new knowledge and ideas in our team, particularly as much of our work is undertaken independently of our teammates. The Learning Lab format (silent reflection followed by focused and free-flowing discussion/debate) usually catalyses a rich discussion that goes beyond (a) participants' initial knee-jerk thoughts on a topic and (b) the tendency for the direction of a discussion to be dominated by the first idea that is raised. Participants bring different perspectives to an issue, they build on each others' ideas, or perhaps have insights about a situation they experienced, observed or studied that are catalysed by the Learning Lab discussion.

Triangulating and testing ideas

Some ILT Learning Lab topics have been based on sharing our observations and emerging hunches. Taking space to see if others share that observation and being challenged on it is a useful way to reduce individual bias, or at least to surface bias in our practice and research conclusions!

Informing practice

The knowledge generated through a Learning Lab may result in changed behaviour, as individuals gain instrumental knowledge that they can act on immediately (e.g. knowledge that there is a toolkit that might be useful, an insight about how you are doing things that can be changed) or latent ideas or thinking that lies dormant for a time and surfaces in the form of a new way of doing things when the right opportunity arises. However, unlike other models for reflective practice and action research, changed behaviour is not the primary intention of a Learning Lab, and therefore not highlighted as a particular step in the process.

Building relationships, respect and individual ownership for learning

We've found the Learning Lab approach helpful for building relationships within a team and with 'guest' participants, for improving job satisfaction for people who value reflection within their work and appreciate protected time to 'step back', and for sharing ownership of group learning across a team. In the Learning Lab format, all knowledge is valued and each individual has an opportunity to contribute what they know (through silent reflection and discussion) and a responsibility to self-facilitate the process. Furthermore, the three-hour contained format puts boundaries around the commitment required and does not 'force' one participant into a leadership role – as there is very little to prepare or organise ahead of time.

What value does a Learning Lab NOT generate?

By contrast, we found the Learning Lab approach is less useful in some other situations.

Communicating specific messages or large chunks of information

We have found that if people participate with an advocacy agenda of some kind they are less likely to listen to others. Likewise, the format promotes equal participation. If one person has a lot of information to impart they tend to take over the discussion.

Facilitating reflection or learning where the desire to learn/reflect does not come from within the group

The process is self-facilitating and relies on commitment from all participants. It doesn't work so well when participants are waiting to be told what they need to learn rather than seeking out an opportunity to learn.

Facilitating learning in advance of a particular activity/event

We introduced the Learning Lab process to a group just days before they facilitated a workshop, when they felt that their preparations were already complete and when they did not have sufficient time to incorporate what they had learned. This created anxiety rather than assisting improvement. Our hunch is that the Learning Lab process could be useful for learning before doing if it is built in to a project development cycle with plenty of time for participants to respond to what they have learned.

Facilitating learning about a particular activity/event

Because the Learning Lab process is focused on what you know rather than specifically what you did, other reflection processes will be more appropriate for debriefing on a particularly activity or event.

What questions remain about the Learning Lab process?

The Learning Lab approach is emergent, and we have a number of outstanding questions about the benefits and limitations of this approach.

How does pre-reading change the Learning Lab process?

We hypothesise that if people are more widely read on a topic before they come to a Learning Lab they will have more to offer in the session. For example, if five people were sent five different papers/blogs/knowledge items on value for money and asked to read these before the Learning Lab they would contribute ideas from these papers to the Learning Lab process.

Does the Learning Lab process work better for different types of topics?

We hypothesise that the Learning Lab works best for topics that are open-ended and where there is a lot of scope for different perspectives. We think tightly defined technical questions with a right or wrong answer would 'close down' quickly in this process. E.g. 'What have we learned about using CRM?' technical question vs 'what have we learned about the value CRM brings to the organisation?' more conceptual/nuanced.

Does the Learning Lab process encourage group-think?

We hypothesise that, like many processes based on experiential learning within groups, there may be a tendency towards consensus that may not be shared by others outside of that group. The part of the Learning Lab that encourages people to identify what tools and resources exist may off-set this as it acknowledges that there is more than the experience in the room to bring to this topic.

How can we share the learning from a Lab with people who did not attend?

We hypothesise that people learn best when they identify lessons themselves. A strength of the Learning Lab format is that it is contained within a three-hour commitment, and scribes are only expected to write very brief notes that can be understood by people who were there. What can we use for sharing learning beyond the participant group? And do people learn effectively through a second-hand Learning Lab anyway?

Conclusion

We find the Learning Lab process useful for reflecting on collective knowledge that comes from a wide range of sources; knowledge that is not specifically linked to an action cycle; and knowledge that can change over time. The format is manageable for busy practitioners, and is greatly enhanced by a common commitment to and ownership of individual and group learning.

Others may also get value from this approach if they want to draw together knowledge from varied sources; to document their collective knowledge as part of an action or research journey; or if they want to build a common knowledge base within their teams.

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End Note

[1] E.g. ORID, after action reviews, self evaluation.

[2] Focused Discussion Method or 'ORID': ORID is a mnemonic describing the four distinct stages of questioning in this method – these are Objective questions, Reflective questions, Interpretative questions and Decision questions.

[3] Modified process is to split the group into subgroups of 4-10 people and run concurrent Learning Labs on the same or different topics

[4] We have experienced successful learning labs where the questions have been generated during the session. However, these sessions have usually been attended by people with a lot of common ground in their work, and therefore some widely relevant topics have naturally emerged. It can be reassuring for new participants to have some sense of what general topics will be under scrutiny before they arrive, even if the specific questions have not been refined. E.g. An invitation to 'a Learning Lab that will focus on issues to do with research communications' should give sufficient information for participants to decide whether this is relevant to them or not and still leaves plenty of space for any number of issues to be explored depending on the specific interests of the people present.

[5] If you are using a Learning Lab approach as part of an ongoing research programme, you may prefer to type up all of the flip chart notes as well to aid qualitative analysis using programmes like NVIVO.

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About the Impact and Learning Team (ILT)

What makes development research accessible, relevant or appropriate for people outside the research community? Does development research get its due in policymaking and practice? What would be value for money in research communication?

The Impact and Learning Team at IDS are interested in how communication of research brings about change - in particular, what happens when people and technology mediate between researchers and decision makers. We use the term 'intermediary' to describe people and technology acting in this way. We think they play a critical role in making knowledge accessible, relevant and responsive to demand.

The work we are doing in the Impact and Learning Team (ILT) is exploring and testing this assumption using action research. We support people to think about the difference they want to make as well as how they are going to go about it. We draw insights and approaches from IDS's history of research, and the fields of marketing, strategic planning and evaluation, and capacity development.

This Practice Paper is an output from our work.

Full list of papers in this set

Batchelor, S. Gregson, J. and Crooks, B. (2011) 'Learning about an Alternative Approach to Strategic Discussions,' *IDS Practice Paper In Brief* 2, Brighton: IDS

Ishmael Perkins, N. and Okail, N. (2011) 'The Large Conference Re-Imagined and Re-visited,' *IDS Practice Paper In Brief* 3, Brighton: IDS

Evangelia, B. (2011) 'Learning About New Technologies and the Changing Evidence Base for Social Science Research and Decision Making in International Development,' *IDS Practice Paper In Brief* 4, Brighton: IDS

Hogan, C. (2011) 'Learning about the Role of Culture in Research Policy Intermediary Work,' *IDS Practice Paper In Brief* 5, Brighton: IDS

Batchelor, S. and Hogan, C. (2011) 'Learning about "Learning Styles" in Getting Research into Policy Use and Practice?', *IDS Practice Paper In Brief* 6, Brighton: IDS

Perkins, N. I. with Batchelor, S. (2011) 'Learning' from and Within a Multi-sited Organisation', I*DS Practice Paper In Brief* 7, Brighton: IDS

Birchall, J. Batchelor, S. and Hayes, C. (2012) 'Learning about Mainstreaming Gender in Knowledge Intermediary Work', *IDS Practice Paper In Brief* 8, Brighton: IDS

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