

**ILM LEVEL 5
CERTIFICATE
AND DIPLOMA IN
ACTION LEARNING
FACILITATION**



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ILM LEVEL 5 CERTIFICATE AND DIPLOMA IN ACTION LEARNING FACILITATION

[Certificate Qualification No. – 501/0901/7]
[Diploma Qualification No. – 501/0895/5]

Note: This qualification specification should always be read in conjunction with the “Supporting Notes for ILM VRQs” document which is downloadable from ILM website or it can be accessed via your Quality Manager/External Verifier or from the ILM Customer Services Team by emailing at customer@i-l-m.com

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QUALIFICATIONS OVERVIEW:

ILM Level 5 Certificate in Action Learning Facilitation		
Purpose of the qualification	To provide those involved in leadership and management development with the knowledge and skills required to organise and facilitate an action learning programme.	
Progression routes	<p>The qualification provides opportunities for progression to other qualifications at the same or higher levels</p> <ul style="list-style-type: none"> • ILM Level 5 Diploma in Action Learning Facilitation • ILM Level 5 Certificate and Diploma in Coaching and Mentoring in Management • ILM Level 7 Certificate and Diploma in Executive Coaching and Leadership Mentoring 	
Credit Value	17 (minimum)	
Induction	2 Hours	
Tutorial Support	At least 3 hours	
Guided Learning Hours (this includes time for induction, tutorial support and the units guided learning hours)	Minimum of 55 hours	
To be completed within	3 Years	
Structure	Mandatory Units	Credit Value
	M5.35 – Improving performance through action learning	5 credits
	M5.36 – Review own ability to facilitate and support action learning	5 credits
	M5.37 – Facilitating action learning	7 credits

ILM Level 5 Diploma in Action Learning Facilitation		
Purpose of the qualification	To provide those involved in leadership and management development with the knowledge and skills required to organise and facilitate an action learning programme.	
Progression routes	<p>The qualification provides opportunities for progression to other qualifications at the same or higher levels</p> <ul style="list-style-type: none"> • ILM Level 5 Certificate and Diploma in Coaching and Mentoring in Management • ILM Level 7 Certificate and Diploma in Executive Coaching and Leadership Mentoring 	
Credit Value	37 (minimum)	
Induction	2 Hours	
Tutorial Support	At least 3 hours	
Guided Learning Hours (this includes time for induction, tutorial support and the units guided learning hours)	Minimum of 70 hours	
To be completed within	3 Years	
Structure	Mandatory Units	Credit Value
	M5.35 – Improving performance through action learning	5 credits
	M5.36 – Review own ability to facilitate and support action learning	5 credits
	M5.37 – Facilitating action learning	7 credits
	M5.38 – Undertaking an extended period of supervised action learning facilitation	20 credits

What is Action Learning?

Action Learning is a technique used primarily in leadership and management development. It was developed by Professor Reg Revans and he himself emphasised that it was a very simple idea – that leaders and managers learn best by working together in a group (called an Action Learning Set) to help each other to find solutions to real work problems by discussion. The way Revans expressed his model was through an equation:

$$L = P+Q$$

where:

$$\begin{aligned} L &= \text{Learning} \\ P &= \text{Programmed (or expert-provided) knowledge} \\ Q &= \text{Questioning} \end{aligned}$$

In other words, we learn best when our learning is driven by the power of critical inquiry (questioning) supported by access to the knowledge and experience of those who have come before us – accessed through learning resources and expert tutors.

Profile of Action Learning Facilitators

The action learning set facilitator helps participants to take responsibility for their learning both individually and as a group/set and provides guidance to the set to ensure that it adheres to the basic principles outlined above. The facilitator is therefore likely to be someone with experience of leadership and management development who can ask appropriate challenging questions, identify appropriate 'programmed knowledge', and assist set members in making sense of what they have learnt and apply their learning to their workplace and ensure action is taken.

Facilitators could be learning and development practitioners, trainers, college tutors, those responsible for organisation development and/or service/business improvement or delivery. Facilitators would need in-depth knowledge of leadership and management theory and practice as well as having the authority and resource to support the action learning. They must have the opportunity to work with a group of managers at a level for which they can provide the appropriate access.

Acknowledgments

ILM would like to thank Mike Pedler and Christine Abbott from the Centre for Action Learning Facilitation for allowing us to draw on their expertise and professional knowledge within the field of Action Learning.

OCCUPATIONAL COMPETENCY REQUIREMENTS FOR THE LEVEL 5 CERTIFICATE AND DIPLOMA IN ACTION LEARNING FACILITATION

It is the centres responsibility to ensure that they have competent and suitably qualified staff involved in delivering, quality assuring and/or assessing qualifications.

The table below shows the occupational competence requirements of tutors, internal quality assurers and/or assessors. Given that occupational competence requirements will vary greatly between lower and higher level qualifications, this table will highlight if there is an additional requirement of any qualification specific occupational competency.

Tutors Occupational Competence Requirements	Evidence Indicators
A thorough knowledge and understanding of the qualification(s).	<ul style="list-style-type: none"> • Have a relevant qualification in the subject area that must be at equal or higher level or have an equivalent qualification. • Show evidence of information or documents prepared for learners such as a learner journey plan (SoW), lesson plan, learner guidance notes, tutorial support plan etc. for the ILM qualification. • Show evidence of participation in Continuing Professional Development (CPD) in relation to the relevant field and qualification requirements.
Relevant and credible experience in the field of the relevant qualification.	<ul style="list-style-type: none"> • Be able to prove that they have current experience of delivering training appropriate to the level and subject area of these qualifications
A qualification in support of assessment and internal quality assurance.	<ul style="list-style-type: none"> • Ideally hold a valid and recognised teaching/training qualification.

Internal Quality Assurers and/or Centre Assessors Occupational Competence Requirements	Evidence Indicators
A thorough knowledge and understanding of the relevant qualification(s).	<ul style="list-style-type: none"> • Have a relevant qualification in the subject area that must be at equal or higher level or have an equivalent qualification. • Show evidence of carrying out CPD in order to familiarise themselves with current standards for assessment/verification in the subject area of this qualification.
Relevant and credible experience in the field of the relevant qualification.	<ul style="list-style-type: none"> • Demonstrate clear evidence of current experience in quality assurance and/or assessment appropriate to the level and subject area of these qualifications
A qualification in support of assessment and/or internal quality assurance.	<ul style="list-style-type: none"> • Ideally hold an assessment qualification (e.g. TAQA or equivalent)
Experience and a working knowledge of the operational and assessment processes for the relevant qualification.	<ul style="list-style-type: none"> • Demonstrate an understanding of the organisation's management centric policies, procedures and practices. • Demonstrate knowledge and understanding of ILM's quality assurance policy, procedures and requirements.

ASSESSMENT GUIDANCE FOR THE LEVEL 5 CERTIFICATE AND DIPLOMA IN ACTION LEARNING FACILITATION

A brief introduction on ILM's Assessment Strategy can be found in *Supporting notes for ILM VRQs*. For detailed information, centres are encouraged to refer to the various assessment guides that are available from the ILM Customer Services Team at customer@i-l-m.com or refer to the Centre Manual (www.i-l-m.com/centres.aspx). This segment gives you specific guidance around assessments for the Level 5 Certificate and Diploma in Action Learning Facilitation.

Appendix B in this document outlines the assessments and mark sheets for the mandatory units in this qualification. Centres should use the prescribed assessments. However some flexibility is permitted. In exceptional circumstances and to meet a specific need a centre may deviate from the prescribed assessment subject to prior written approval from ILM. Equal opportunities issues are relevant to all units of study and these aspects should be explicitly addressed in the delivery and assessment of this programme. The table below gives a brief overview of the units and assessment(s):

Units	Assessment
M5.35 – Improving performance through action learning	
M5.36 – Review own ability to facilitate and support action learning	
M5.37 – Facilitating action learning	
M5.38 – Undertaking an extended period of supervised action learning facilitation	

Learners are likely to come from a variety of backgrounds, in that they will have had different training and work experiences, differing ambitions and opportunities, centres therefore can encourage learners to select topics for assessment in their own organisation and/or area of work, (or within another organisation if they are currently unemployed or self-employed). They should ensure learners are able to present their work as simple and clearly as possible. An approximate word count is given for each assessment. This should only be seen as a guide to help achieve a balanced piece of work.

Centres must ensure that learners adequately complete all sections of the assessment. To ensure all learning outcomes are assessed, section passes have been provided in the assessments. To assist this practice, ILM normally applies a pass mark of 50% in each section as reflecting a minimum pass. Centres must note that compensation between learning outcomes is not allowed in any QCF unit.

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A P P E N D I X - A

MANDATORY UNITS SPECIFICATIONS FOR LEVEL 5 CERTIFICATE AND DIPLOMA IN ACTION LEARNING FACILITATION

Title:	Improving performance through action learning (M5.35)	
Level:	5	
Credit value:	5	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand the characteristics of effective action learning	1.1 Establish the characteristics of effective action learning
2	Understand the role of a facilitator in an action learning programme	2.1 Explain the importance of respecting others' ethical views, beliefs, attitudes and values in a facilitation role 2.2 Explain the importance of challenging inappropriate language or behaviour in a facilitation role 2.3 Explain the importance of not abusing own power and authority in a facilitation role 2.4 Explain the importance of creating the necessary, safe and confidential conditions for engaging in effective action learning 2.5 Explain the importance of agreeing the expectations, processes and boundaries of an action learning intervention with all stakeholders 2.6 Explain why action learning facilitators should develop enhanced communication skills and be able to analyse communication to identify meaning
3	Know how to justify action learning in an organisation	3.1 Explain the link between effective action learning and leadership development 3.2 Appraise the contribution action learning can make to teams and the organisation 3.3 Appraise the role of action learning in relation to alternative developmental and support strategies in the organisation 3.4 Identify potential organisational barriers in the organisation to using action learning and develop appropriate strategies for overcoming them 3.5 Evaluate the opportunities for using action learning to address specific developmental and support needs in an organisation 3.6 Establish how the effectiveness of the proposed action learning intervention can be evaluated
Additional information about the unit		
Unit purpose and aim(s)		To enable participants to understand the justification for action learning in an organisation and the contribution of action learning to individual, team and organisation performance.

Unit review date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Restricted to ILM
Units available from	01/08/2010
Unit guided learning hours	20

Additional Guidance about the Unit

Indicative Content:

1	<ul style="list-style-type: none"> • The nature of action learning and the historical perspective • Different perspectives and schools of action learning • Different models of learning styles • Comparisons with other problem solving techniques used in the workplace
2	<ul style="list-style-type: none"> • Types of facilitative approaches • Examples of models and research into action learning able to contribute to performance improvement (examples of models that may be used include: Revans model, Argyris's double loop learning, Kolb's learning cycle, hemispherical dominance, transformational learning, Johari's window, McGill's socialisation models, the work of Mike Pedlar , Marquart, Marsick, O'Neill and the research from the Centre for Action Research and Professional Practice at Bath University) • Legal aspects of action learning facilitation (Health & Safety, Equal Opportunities, Disability, etc.) and ethical issues (abuse of power and authority, personal intimacy and sexual harassment) • Concepts of power and authority (personal/positional, zero-sum) and power dynamics (especially power relationship between self and group) • Cultural issues working with a diverse workforce (gender stereotyping, race, religion and sexuality, etc.) • Personal beliefs and values, their source and effect on attitudes and behaviours • Behavioural traits, their drivers and effect on others (e.g. nature/nurture debate on sex/gender, and differences in cognition and behaviour) • Communication theories (e.g. discourse analysis theories, overview of socio-linguistics) • Relationship characteristics and contrasts between action learning, group coaching judgemental/non-judgemental, Transactional Analysis, etc • Distinguishing the appropriate physical environments for action learning, especially the need for ground rules and confidentiality

<p>3</p>	<ul style="list-style-type: none"> • Models of Leadership • Costs, risks and benefits of action learning interventions – financial and personal/social/emotional • Strategies for overcoming organisational and operational barriers (time, resources, attitudes, values and ownership) • Range of alternative learning methodologies, their costs, risks and benefits and utility in developing particular knowledge and skills (for example taught management programmes, case studies, experiential learning) • Contribution of action learning to the achievement of organisational, team and individual objectives • Techniques for programme monitoring, review and evaluation
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Title:	Review own ability to facilitate and support action learning (M5.36)	
Level:	5	
Credit value:	5	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Know how to review own action learning facilitation practice	1.1 Review your ethical views, beliefs, attitudes and values and their effect on own action learning facilitation practice 1.2 Review your ability to address poor or inappropriate attitudes, behaviours and working relationships and their effect on your action learning facilitation practice
2	Know how to review own networks and communication ability in supporting and facilitating action learning	2.1 Review the effectiveness of your networks in supporting action learning facilitation practice 2.2 Review your ability to communicate effectively when facilitating groups
3	Understand how to improve current practice	3.1 Devise strategies to improve current practice based on review of own abilities
Additional information about the unit		
Unit purpose and aim(s)		To enable participants to review their ability to perform effectively as action learning facilitators.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Restricted to ILM

Units available from	01/08/2010
Unit guided learning hours	20
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Recognition of needs beyond facilitators competence (personal social or psychological problems, learning difficulties or disabilities) and available support services • Negotiation strategies and techniques • Individuals workplace relationships and how these may impact on the facilitation process
2	<ul style="list-style-type: none"> • Managing self and time in order to build and sustain networks • Verbal and non-verbal communication skills (questioning, listening, analysis of non-verbal communication, reflection and summarising skills) • Nature and value of networks, analysis of personal networks and development of networking skills
3	<ul style="list-style-type: none"> • Strategies to challenge and effectively alter inappropriate attitudes and behaviour • Strategies and techniques for addressing and improving poor personal relationships in the action learning set • Strategies and techniques for addressing and improving verbal and non-verbal communication skills • Strategies and techniques for improving the effectiveness of networks

Title:	Facilitating action learning (M5.37)	
Level:	5	
Credit value:	7	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand how to negotiate an action learning intervention with clients and other stakeholders	1.1 Negotiate with clients and other stakeholders to agree the goals for an action learning intervention
2	Know how to design and deliver an action learning intervention	2.1 Design and agree an action learning intervention for a minimum of 12 hours to meet negotiated goals 2.2 Plan individual action learning sessions and develop and prepare appropriate materials and resources to support these sessions 2.3 Deliver action learning sessions for a minimum of 12 hours and maintain appropriate records 2.4 Review individuals' progress using individual action plans
3	Understand how to reflect on and review own action learning facilitation practice in order to improve	3.1 Collect feedback on own action learning facilitation practice 3.2 Reflect on and review own action learning facilitation practice 3.3 Identify own development needs and plan to improve own action learning facilitation practice
Additional information about the unit		
Unit purpose and aim(s)		To enable participants to demonstrate their ability to negotiate, undertake, and review an action learning intervention.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		
Location of the unit within the subject/sector classification system		Business Management

Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Restricted to ILM
Units available from	01/08/2010
Unit guided learning hours	10
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Negotiating goals for action learning • Techniques appropriate to different action learning interventions
2	<ul style="list-style-type: none"> • Characteristics of effective action learning planning (SMART ((ER)) targets) • Criteria for developing coherent and logical plans for action learning • Recording and monitoring action learning set activities by the facilitator • Determining appropriate action learning styles and methods • Analyse and select materials and information to support action learning • Techniques for assessing the learning and development of both the set and the individuals • The differences between individual and team outcomes • Set learning styles and characteristics • Strategies and practises for building effective relationships • Behaviours to encourage social interaction, openness, honesty, and trust and their significance in action learning facilitation
3	<ul style="list-style-type: none"> • Reflection as a strategy for self-knowledge and improvement • Concepts of the reflective practitioner, theory and behaviour

Title:	Undertaking an extended period of supervised action learning facilitation (M5.38)	
Level:	5	
Credit value:	20	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Know how to negotiate and agree an extended period of supervised action learning facilitation	1.1 Negotiate and agree with clients and other stakeholders the goals for at least 100 hours of supervised action learning facilitation 1.2 Negotiate and agree with supervisor the basis for the supervision contract 1.3 Negotiate and agree demanding but realistic personal learning and development goals for the action learning facilitation with supervisor
2	Know how to plan, deliver and maintain records for an extended period of supervised action learning facilitation	2.1 Plan and organise the supervised action learning facilitation 2.2 Develop and prepare appropriate materials and resources, as required 2.3 Deliver supervised action learning sessions for a minimum of 100 hours and maintain appropriate records
3	Know how to review the effectiveness of supervised action learning interventions in attaining agreed goals	3.1 Review with clients, supervisor and other stakeholders, the effectiveness of the supervised action learning interventions in attaining agreed goals
4	Know how to use reflective learning and supervision to develop and improve own action learning facilitation to achieve demanding but realistic goals	4.1 Collect and analyse feedback from clients and stakeholders on own performance over the period of supervised action learning facilitation 4.2 Reflect on and review attainment of personal learning and development goals in conjunction with supervisor 4.3 Reflect on and review supervision contract with supervisor
5	Understand how to develop networks to support own and others' action learning facilitation practice and continuing professional development	5.1 Identify opportunities to join new networks or engage with existing networks to support and develop own and others' action learning facilitation practice
Additional information about the unit		
Unit purpose and aim(s)		To enable participants to develop and improve their performance, under supervision, as action learning facilitators and as reflective practitioners.

Unit review date	31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from a sector skills council or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Restricted to ILM
Units available from	01/08/2010
Unit guided learning hours	10
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> The nature, purpose and practice of individual, group and peer supervision The supervision contract Negotiating goals for action learning Setting and reviewing demanding but realistic personal learning goals <p>Using a personal development plan to set demanding but realistic goals and manage own continuous improvement and personal development</p>
2	<ul style="list-style-type: none"> Characteristics of effective action learning interventions Criteria for developing coherent and logical action learning interventions Recording, monitoring and reviewing action learning set activities Determining appropriate action learning styles and methods Methodologies and criteria for analysing materials and information supporting action learning Set and individual learning styles and characteristics Techniques appropriate to different action learning sets and individuals
3	<ul style="list-style-type: none"> Techniques for assessing the development of a set Monitoring and review techniques
4	<ul style="list-style-type: none"> Using reflection and critical review as a technique for learning and improving own performance Collecting and analysing feedback
5	<ul style="list-style-type: none"> Nature and value of networks, analysis of personal networks and development of networking skills Managing self and time to build and sustain networks Use of networks to support own and others' CPD

A P P E N D I X - B

MANDATORY ASSESSMENTS FOR ILM LEVEL 5 CERTIFICATE AND DIPLOMA IN ACTION LEARNING FACILITATION

WORK-BASED ASSIGNMENT: M5.35: IMPROVING PERFORMANCE THROUGH ACTION LEARNING

Centre Number:	Centre Name:
Learner Registration No:	Learner Name:
<p>TASK Establish the characteristics of effective action learning; explain the role of the action learning facilitator, and justify action learning in an organisation and evaluate the contribution effective action learning makes to individual, team and organisation performance.</p> <p>The 'nominal' word count for this assignment is 2000 words: the suggested range is between 1500 and 2500 words.</p> <p>Check your assignment carefully prior to submission using the assessment criteria.</p>	
<i>Please use the headings shown below when writing up your Assignment</i>	Assessment Criteria
<p>Understand the characteristics of effective action learning</p> <p><i>(min 5 marks required from 10 available)</i></p>	<ul style="list-style-type: none"> The characteristics of effective action learning are established
<p>Understand the role of a facilitator in an action learning programme</p> <p><i>(min 22 marks required from 44 available)</i></p>	<ul style="list-style-type: none"> The importance of respecting others' ethical views, beliefs, attitudes and values in a facilitation role is explained The importance of challenging inappropriate language or behaviour in a facilitation role is explained The importance of not abusing own power and authority in a facilitation role is explained The importance of creating the necessary, safe and confidential conditions for engaging in effective action learning is explained The importance of agreeing the expectations, processes and boundaries of an action learning intervention with all stakeholders is explained Why action learning facilitators should develop enhanced communication skills and be able to analyse communication to identify meaning is explained
<p>Know how to justify action learning in an organisation</p>	<ul style="list-style-type: none"> The link between effective action learning and leadership development is explained The contribution action learning can make to teams and the organisation is appraised The role of action learning in relation to alternative developmental and support strategies in the organisation is appraised Potential organisational barriers to using action learning are identified Appropriate strategies for overcoming potential organisational barriers are

<p><i>(min 23 marks required from 46 available)</i></p>	<p>developed</p> <ul style="list-style-type: none"> • The opportunities for using action learning to address specific developmental and support needs in an organisation are evaluated • How the effectiveness of the proposed action learning intervention can be evaluated is established
<p>By submitting I confirm that this assessment is my own work</p>	

MARK SHEET: WORK-BASED ASSIGNMENT: M5.35: IMPROVING PERFORMANCE THROUGH ACTION LEARNING

Centre Number:		Centre Name:		
Learner Registration No:		<p>1. Learner named below confirms authenticity of submission.</p> <p>2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.</p> <p>However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/></p>		
Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
<p>Understand the characteristics of effective action learning</p> <ul style="list-style-type: none"> The characteristics of effective action learning are established 			/10 marks (min 5)	
<p>Understand the role of a facilitator in an action learning programme</p> <ul style="list-style-type: none"> The importance of respecting others' ethical views, beliefs, attitudes and values in a facilitation role is explained The importance of challenging inappropriate language or behaviour in a facilitation role is explained The importance of not abusing own power and authority in a facilitation role is explained The importance of creating the necessary, safe and confidential conditions for engaging in effective action learning is explained The importance of agreeing the expectations, processes and boundaries of an action learning intervention with all stakeholders is explained Why action learning facilitators should develop enhanced communication skills and be able to analyse communication to identify meaning is explained 			/44 marks (min 22)	

Know how to justify action learning in an organisation <ul style="list-style-type: none"> • The link between effective action learning and leadership development is explained • The contribution action learning can make to teams and the organisation is appraised • The role of action learning in relation to alternative developmental and support strategies in the organisation is appraised • Potential organisational barriers to using action learning are identified • Appropriate strategies for overcoming potential organisational barriers are developed • The opportunities for using action learning to address specific developmental and support needs in an organisation are evaluated • How the effectiveness of the proposed action learning intervention can be evaluated is established 							/46 marks (min 23)
Assessor's decision				Quality assurance use			
Total marks		Outcome (circle as applicable)		Total marks		Outcome (circle as applicable)	
Total 50 + overall, AND minimum in each section		PASS/REFERRAL		Total 50 + overall, AND minimum in each section		PASS/REFERRAL	
Section referral if applicable:				Date of IQA check:			
Name of assessor:				Name of IQA:			
Assessor signature and date:				IQA signature:			
ILM EV signature:				Date externally verified (where applicable):			

WORK-BASED ASSIGNMENT: M5.36: REVIEW OWN ABILITY TO FACILITATE AND SUPPORT ACTION LEARNING

Centre Number:	Centre Name:
Learner Registration No:	Learner Name:
<p>TASK Review your action learning facilitation practice and the effectiveness of your networks in supporting your action learning facilitation practice, and devise strategies to improve your current practice based on your reviews.</p> <p>The 'nominal' word count for this assignment is 1500 words: the suggested range is between 1000 and 2000 words.</p> <p>Check your assignment carefully prior to submission using the assessment criteria.</p>	
<i>Please use the headings shown below when writing up your Assignment</i>	Assessment Criteria
<p>Know how to review own action learning facilitation practice</p> <p><i>(min 20 marks required from 40 available)</i></p>	<ul style="list-style-type: none"> • Own ethical views, beliefs, attitudes and values and their effect on own action learning facilitation practice are reviewed • Own ability to address poor or inappropriate attitudes, behaviours and working relationships and their effect on your action learning facilitation practice is reviewed
<p>Know how to review own networks and communication ability in supporting and facilitating action learning</p> <p><i>(min 20 marks required from 40 available)</i></p>	<ul style="list-style-type: none"> • The effectiveness of your networks in supporting action learning facilitation practice is reviewed • Your ability to communicate effectively when facilitating groups is reviewed
<p>Understand how to improve current practice</p> <p><i>(min 10 marks required from 20 available)</i></p>	<ul style="list-style-type: none"> • Strategies to improve current practice based on review of own abilities are devised
By submitting I confirm that this assessment is my own work	

MARK SHEET: WORK-BASED ASSIGNMENT: M5.36: REVIEW OWN ABILITY TO FACILITATE AND SUPPORT ACTION LEARNING

Centre Number:		Centre Name:		
Learner Registration No:		1. Learner named below confirms authenticity of submission. 2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed. However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/>		
Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Know how to review own action learning facilitation practice <ul style="list-style-type: none"> • Own ethical views, beliefs, attitudes and values and their effect on own action learning facilitation practice are reviewed • Own ability to address poor or inappropriate attitudes, behaviours and working relationships and their effect on your action learning facilitation practice is reviewed 			/40 marks (min 20)	
Know how to review own networks and communication ability in supporting and facilitating action learning <ul style="list-style-type: none"> • The effectiveness of your networks in supporting action learning facilitation practice is reviewed • Your ability to communicate effectively when facilitating groups is reviewed 			/40 marks (min 20)	
Understand how to improve current practice <ul style="list-style-type: none"> • Strategies to improve current practice based on review of own abilities are devised 			/20 marks (min 10)	
Assessor's decision		Quality assurance use		
Total marks	Outcome (circle as applicable)	Total marks	Outcome (circle as applicable)	
Total 50 + overall, AND minimum in each section	PASS/REFERRAL	Total 50 + overall, AND minimum in each section	PASS/REFERRAL	
Section referral if applicable:		Date of IQA check:		
Name of assessor:		Name of IQA:		

Assessor signature and date:	IQA signature:
ILM EV signature:	Date externally verified (where applicable):

WORK-BASED ASSIGNMENT: M5.37: FACILITATING ACTION LEARNING

Centre Number:	Centre Name:
Learner Registration No:	Learner Name:
<p>TASK Negotiate, agree, and plan and deliver a twelve hour minimum action learning intervention devising appropriate materials and resources, and gather feedback to reflect on and review your performance in order to identify development needs and plan improvements to your action learning facilitation practice.</p> <p>Centres are encouraged to use a variety of methods to assess components of this unit such as observation or digital recording of facilitation performance (verbal and/or visual) supported by:</p> <ul style="list-style-type: none"> • planning documents for the event/programme • facilitator reflections log • notes of the problem solving cycle • participants' observations and reflections • action plans to develop and improve facilitation of performance <p>The 'nominal' word count for this assignment, <i>excluding</i> materials and resources to support the sessions, is 2000 words: the suggested range is between 1500 and 2500 words.</p> <p>Check your assignment carefully prior to submission using the assessment criteria.</p>	
<i>Please use the headings shown below when writing up your Assignment</i>	Assessment Criteria
<p>Understand how to negotiate an action learning intervention with clients and other stakeholders</p> <p><i>(min 7 marks required from 14 available)</i></p>	<ul style="list-style-type: none"> • Negotiated with clients and other stakeholders to agree the goals for an action learning intervention
<p>Know how to design and deliver an action learning intervention</p> <p><i>(min 30 marks required from 60 available)</i></p>	<ul style="list-style-type: none"> • An action learning intervention for a minimum of 12 hours to meet negotiated goals has been designed and agreed • Individual action learning sessions have been planned • Appropriate materials and resources to support these sessions have been developed and prepared • Action learning sessions for a minimum of 12 hours have been delivered • Appropriate records have been maintained • Individuals' progress has been reviewed using individual action plans
<p>Understand how to reflect on and review own action learning facilitation practice in order to improve</p>	<ul style="list-style-type: none"> • Feedback on own action learning facilitation practice has been collected • Reflected on and reviewed own action learning facilitation practice • Identified own development needs • Planned to improve own action learning facilitation practice

<i>(min 13 marks required from 26 available)</i>	
By submitting I confirm that this assessment is my own work	

MARK SHEET: WORK-BASED ASSIGNMENT: M5.37: FACILITATING ACTION LEARNING

Centre Number:		Centre Name:		
Learner Registration No:		1. Learner named below confirms authenticity of submission. 2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed. However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/>		
Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand how to negotiate an action learning intervention with clients and other stakeholders <ul style="list-style-type: none"> Negotiated with clients and other stakeholders to agree the goals for an action learning intervention 			/14 marks (min 7)	
Know how to design and deliver an action learning intervention <ul style="list-style-type: none"> An action learning intervention for a minimum of 12 hours to meet negotiated goals has been designed and agreed Individual action learning sessions have been planned Appropriate materials and resources to support these sessions have been developed and prepared Action learning sessions for a minimum of 12 hours have been delivered Appropriate records have been maintained Individuals' progress has been reviewed using individual action plans 			/60 marks (min 30)	
Understand how to reflect on and review own action learning facilitation practice in order to improve <ul style="list-style-type: none"> Feedback on own action learning facilitation practice has been collected Reflected on and reviewed own action learning facilitation practice Identified own development needs Planned to improve own action learning facilitation practice 				

						/26 marks (min 13)	
Assessor's decision				Quality assurance use			
Total marks		Outcome (circle as applicable)		Total marks		Outcome (circle as applicable)	
Total 50 + overall, AND minimum in each section		PASS/REFERRAL		Total 50 + overall, AND minimum in each section		PASS/REFERRAL	
Section referral if applicable:				Date of IQA check:			
Name of assessor:				Name of IQA:			
Assessor signature and date:				IQA signature:			
ILM EV signature:				Date externally verified (where applicable):			

WORK-BASED ASSIGNMENT: M5.38: UNDERTAKING AN EXTENDED PERIOD OF SUPERVISED ACTION LEARNING FACILITATION

Centre Number:	Centre Name:
Learner Registration No:	Learner Name:
<p>TASK Negotiate, agree, and plan and deliver a one hundred hour minimum supervised action learning facilitation devising appropriate materials and resources; gather feedback to reflect on and review your attainment of agreed personal learning and development goals, and identify opportunities to network to support and develop learning facilitation practice.</p> <p>Centres are encouraged to use a variety of methods to assess components of this unit such as observation or digital recording of facilitation performance (verbal and/or visual) supported by:</p> <ul style="list-style-type: none"> • planning documents for the event/programme • facilitator reflections log • notes of the problem solving cycle • participants' observations and reflections • action plans to develop and improve facilitation of performance <p>The 'nominal' word count for this assignment, <i>excluding</i> materials and resources to support the sessions, is 2000 words: the suggested range is between 1500 and 2500 words.</p> <p>Check your assignment carefully prior to submission using the assessment criteria.</p>	
<i>Please use the headings shown below when writing up your Assignment</i>	Assessment Criteria
<p>Know how to negotiate and agree an extended period of supervised action learning facilitation</p> <p><i>(min 7 marks required from 14 available)</i></p>	<ul style="list-style-type: none"> • The goals for at least 100 hours of supervised action learning facilitation have been negotiated and agreed with clients and other stakeholders • The basis for the supervision contract has been negotiated and agreed with supervisor • Demanding but realistic personal learning and development goals for the action learning facilitation have been negotiated and agreed with supervisor
<p>Know how to plan, deliver and maintain records for an extended period of supervised action learning facilitation</p> <p><i>(min 23 marks required from 46 available)</i></p>	<ul style="list-style-type: none"> • The supervised action learning facilitation has been planned and organised • Appropriate materials and resources have been developed and prepared, as required • Supervised action learning sessions have been delivered for a minimum of 100 hours • Appropriate records have been maintained

<p>Know how to review the effectiveness of supervised action learning interventions in attaining agreed goals</p> <p><i>(min 8 marks required from 16 available)</i></p>	<ul style="list-style-type: none"> • The effectiveness of the supervised action learning interventions in attaining agreed goals has been reviewed with clients, supervisor and other stakeholders
<p>Know how to use reflective learning and supervision to develop and improve own action learning facilitation to achieve demanding but realistic goals</p> <p><i>(min 7 marks required from 14 available)</i></p>	<ul style="list-style-type: none"> • Feedback from clients and stakeholders on own performance over the period of supervised action learning facilitation has been collected and analysed • Attainment of personal learning and development goals has been reflected on and reviewed in conjunction with supervisor • Supervision contract has been reflected on and reviewed with supervisor
<p>Understand how to develop networks to support own and others' action learning facilitation practice and continuing professional development</p> <p><i>(min 5 marks required from 10 available)</i></p>	<ul style="list-style-type: none"> • Opportunities to join new networks or engage with existing networks to support and develop own and others' action learning facilitation practice have been identified
<p>By submitting I confirm that this assessment is my own work</p>	

MARK SHEET: M5.38: UNDERTAKING AN EXTENDED PERIOD OF SUPERVISED ACTION LEARNING FACILITATION

Centre Number:		Centre Name:		
Learner Registration No:		1. Learner named below confirms authenticity of submission. 2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed. However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/>		
Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Know how to negotiate and agree an extended period of supervised action learning facilitation <ul style="list-style-type: none"> The goals for at least 100 hours of supervised action learning facilitation have been negotiated and agreed with clients and other stakeholders The basis for the supervision contract has been negotiated and agreed with supervisor Demanding but realistic personal learning and development goals for the action learning facilitation have been negotiated and agreed with supervisor 			/14 marks (min 7)	
Know how to plan, deliver and maintain records for an extended period of supervised action learning facilitation <ul style="list-style-type: none"> The supervised action learning facilitation has been planned and organised Appropriate materials and resources have been developed and prepared, as required Supervised action learning sessions have been delivered for a minimum of 100 hours Appropriate records have been maintained 			/46 marks (min 23)	
Know how to review the effectiveness of supervised action learning interventions in attaining agreed goals <ul style="list-style-type: none"> The effectiveness of the supervised action learning interventions in attaining agreed goals has been reviewed with 			/16	

clients, supervisor and other stakeholders			marks (min 8)	
<p>Know how to use reflective learning and supervision to develop and improve own action learning facilitation to achieve demanding but realistic goals</p> <ul style="list-style-type: none"> • Feedback from clients and stakeholders on own performance over the period of supervised action learning facilitation has been collected and analysed • Attainment of personal learning and development goals has been reflected on and reviewed in conjunction with supervisor • Supervision contract has been reflected on and reviewed with supervisor 			/14 marks (min 7)	
<p>Understand how to develop networks to support own and others' action learning facilitation practice and continuing professional development</p> <ul style="list-style-type: none"> • Opportunities to join new networks or engage with existing networks to support and develop own and others' action learning facilitation practice have been identified 			/10 marks (min 5)	
Assessor's decision		Quality assurance use		
Total marks	Outcome <i>(circle as applicable)</i>	Total marks	Outcome <i>(circle as applicable)</i>	
Total 50 + overall, AND minimum in each section	PASS/REFERRAL	Total 50 + overall, AND minimum in each section	PASS/REFERRAL	
Section referral if applicable:		Date of IQA check:		
Name of assessor:		Name of IQA:		
Assessor signature and date:		IQA signature:		
ILM EV signature:		Date externally verified (where applicable):		

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A P P E N D I X - C

LIST OF RESOURCES AVAILABLE

Books and Journals

Section 1 – Basic level

Action Learning in Practice

Editor Mike Pedlar

Publisher: Gower Publishing Ltd, 4th edition,

Publishing date: will be available in 2011.

ISBN: 978-1-4094-1841-2

This latest book from Mike Pedlar reflects the continued growth in Action Learning and related management development methods. The book explores some of the key aspects of designing and running Action Learning programmes, including ways of evaluating the Action Learning approach. It also contains contributions from a number of leading exponents of Action Learning, including Alan Mumford and Reg Revans.

ABC of Action Learning

Author: R.W. Revans, Editor Mike Pedlar

Publisher: Lemos & Crane London,

Publishing date: 1998.

ISBN: 1898001421

Revans writes about the 'how' of action learning, rather than the what! He has explained the structure of the process, avoiding the temptation to produce a prescriptive manual or textbook. So he models his equation: $L = P + Q$. Learning how to 'do' action learning comes from 'doing it' for real.

Action Learning: A Practitioner's Guide

Authors: McGill, Ian & Beaty, Liz,

Publisher: Routledge

Publishing Date: April 2001

ISBN: 978-0-7494-3453-3

A guide to using action learning techniques successfully. Written by two leading figures in the field, this revised edition retains the same practical guidebook approach to how action learning works. Key points include being a facilitator of action learning, and running workshops for a variety of situations, including higher education, organizational change and professional development.

The Action Learner's Toolkit

Author: John Edmonstone

Publisher: Gower Publishing Ltd

Publishing date: June 2003

ISBN: 978-0-566-08466-9

Clear and practical guidance for those new to action learning and the seasoned learner who may encounter new challenges to their thinking. In addition it provides valuable insights for anyone thinking of becoming a facilitator - making the role sound manageable, yet retaining the challenge. Above all the toolkit gives reassurance that this is not only a tried and trusted method for learning but can really help the learner on an immediate basis to decide what they want to do and then support them as they put it into practice

The Action Learning Guidebook: A Real-Time Strategy for Problem Solving Training Design, and Employee Development

Author: William J. Rothwell
Publisher: Wiley
Publishing Date: 1999
ISBN: 978-0-7879-4591-6

Shows how you can ensure that groups, facilitated by managers or team members, can develop the skills and knowledge they require for project planning and problem solving. The guidebook also shows how AL enables participants to: stay focussed on the job; keep the responsibility for their learning; increase motivation and participation; Plan projects and implement solutions; Discover new problem-solving techniques... and much more!

Leading with Questions: How Leaders Find the Right Solutions by Knowing What To Ask

Author: Michael J. Marquardt
Publisher: Jossey-Bass
Publishing date: 2005
ISBN: 978-0-7879-7746-7

Michael Marquardt shows how you can learn to ask the powerful questions that will generate short-term results and long-term learning and success. Throughout the book, he demonstrates how effective leaders use questions to encourage participation and teamwork, foster outside-the-box thinking, empower others, build relationships with customers, solve problems, and much more. Based on interviews with twenty-two successful leaders who "lead with questions".

Action Learning for Managers

Author: Mike Pedler
Publisher: Gower Publishing Ltd; 2 Revised Edition
Publishing date: Jun 2008
ISBN: 978-0566088636

A clear and concise and straightforward guide to this well-established approach to problem solving and learning in groups that enables change in individuals, teams, organizations and systems. With questionnaires, checklists, examples and practical advice, this little book includes everything needed to get started.

Action Learning for Developing Leaders and Organizations: Principles, Strategies, and Cases

Authors: Michael J. Marquardt, EdD; H. Skipton Leonard, PhD; Arthur M. Freedman, PhD; and Claudia C. Hill
Publishing Date: March 2009
ISBN: 978-1-4338-0435-9

Useful business case examples that illustrate the power of Action Learning in successfully developing leaders, solving problems, building teams, and transforming organizations. Recent developments that include skilled coaching and question-based dialogue indicate it as a powerful tool in leadership and organisational development.

The Action Learning Handbook: Powerful Techniques for Education, Professional Development and Training (Revised Edition),

Author: McGILL, I & Brockbank, A
Publisher Routledge, Falmer, Taylor & Francis Group, UK.
Publishing date: 2004
ISBN: 0415335116

This book probes into the technique for those new to action learning. The use of learning sets in action learning are detailed and explored in this practical book written for educators, trainers and developers.

Action Learning

Authors: McGill, I & Beaty, L.
Publisher: Kogan Page Ltd.
Publishing date: 2001
ISBN: 9780749434533

A straightforward and practical guide describing key procedures and skills required to implement action learning. In this book you will find theory on action learning, skills for the facilitator and skills in running a workshop.

ILM also provides additional resources on our on ILM shop <http://www.i-l-m.com/7806.aspx>. In addition our Learner Ring Binders are competitively priced attractive and sturdy ring binders to help organise paperwork and assignments. These are available from the ILM Customer Services at Lichfield on 015432 66866 or customer@i-l-m.com.

In addition, ILM will provide Centres free of charge the following:

Programme brochures
Posters
Exhibition stand loan (return costs + postage payable).

Updated details of products can be found on the ILM website www.i-l-m.com

Section 2 – Advanced level

Action Learning in Practice

Author: Pedler, Mike (Ed.)
 Publisher: Gower Publishing Ltd; 3rd Revised edition
 Publishing date: Dec 1997
 ISBN: 978-0566077951

This revised edition studies the theory, practice, and implementation of AL. Divided into sections, each part deals with AL from a different viewpoint; experienced practitioners present their views on the nature of AL, and eight case studies drawn from a variety of organizations around the world explore their experiences with the programme and the improvements in effectiveness of their people and organisation. Key aspects of designing and running an AL programme are explored, and ways of evaluating the AL approach are described.

Optimizing the Power of Action Learning: Solving Problems and Building Leaders in Real Time

Author: Michael J. Marquardt
 Publisher: Davies-Black
 Publishing Date: 2004
 ISBN: 9780891061915

People with an intense interest in knowing all the details of action learning will find the answer in this book. Author Michael J. Marquardt writes with the zeal of a revival tent preacher, filled with the sincere belief that action learning can help solve any problem, meet any challenge or achieve any aspiration. As he clearly explains, action learning is intended to build both knowledge and leadership. He sets out the steps your organization should pursue to implement action learning, and to use it well. He includes questions, checklists and extensive examples. All he omits are any caveats or cautions about this approach.

Action Learning at Work

Author: Alan Mumford (Ed)
 Publisher: Ashgate Publishing, Limited
 Publishing Date: June 2005
 ISBN: 9780566078903

A collection of 34 articles and papers on AL. All material derives from the work of International Management Centres, a business school dedicated to the AL approach.

BUSINESS-DRIVEN ACTION LEARNING: GLOBAL BEST PRACTICES

Author: Yuri Boshyk
 Publisher: Palgrave MacMillan
 Publishing Date: March 2000
 ISBN: 9780312230944

Business-driven action learning addresses the need for more creative and accountable approaches to learning and earning demanded by the pace of change in business life. This volume shows how it is accomplished through detailed descriptions of how businesses have designed, facilitated and implemented the method.

Understanding Action Learning

Author: Judy O'Neil, Victoria J. Marsick
 ISBN: 9780814473955

Publisher: McGraw-Hill
Publishing Date: Nov 2007

Combining top-shelf research with real-world experience, Understanding Action Learning is a resource target at adult educators everywhere. The book draws on theory from Self-Directed Learning, Learning from Experience, and Transformative Learning, and enables the reader to make an informed decision about which approach or combination suits his or her organization best.

Action Learning Worldwide: Experiences of Leadership and Organisational Development

Author: Yury Boshyk (Ed)
Publisher: Palgrave Macmillan,
Publishing date: September 2002
ISBN: 978-0-333-96870-3

In one volume, the leading proponents and practitioners of action learning define their approach, and describe how action learning and executive and organizational development are practiced in the public, private and 'not-for-profit' sectors around the world. Described in detail are the experiences of General Electric, Merck, Volvo, Japanese and Korean multinationals, as well as the Canadian Civil Service and The World Council of Churches, among others.

Action Learning: History and Evolution.

Authors: Boshyk, Y. and Dilworth, R.L. (Eds.)
Publisher: Palgrave Macmillan
Publishing Date: March 2010

The first of a two volume set that fully explore the roots of action learning and the legacy of its principal pioneer, Reg Revans. Rather than prescribe one approach to action learning, it shows alternative approaches to fit different contexts, including classic action learning, action reflection learning and business driven action learning.

Action Learning: Research & Practice

Publisher: Routledge
Frequency: 3 issues per year
Print ISSN: 1476-7333
Online ISSN: 1476-7341

Action Learning: Research & Practice publish articles which advance knowledge and assist the development of practice through the processes of action learning. Articles aim to create theory, grounded in empirical observation of data and experience that widens understanding of action learning and research in professional and organisational settings. Papers encourage practitioners to gain new insights into their work and help them improve their effectiveness and contribution to their clients and the wider community.