This book explains and demonstrates how indigenous communities – built on traditional knowledge, culture and language – can be extended and strengthened by (1) the new, integrated methodology of Lifelong Action Learning (LAL), and (2) new approaches to learning and development as exemplified by the system of GULL (Global University for Lifelong Learning). The GULL system harnesses the potential of people to bring about positive change together, characterized by self-reliance, financial independence, and cascading learning and benefits to others. It is a self-directed and self-sustainable process of learning and growth. The case studies in this book provide evidence that over time economically very poor communities can achieve transformations that bring with them many benefits personally, professionally and for the community.

This book manages to accomplish an almost impossible goal—to be both deeply inspirational and highly practical all at the same time.

Professor Mary Brydon-Miller, USA

I was sold on this book from the foreword – the need to rethink how we think about and ‘do’ education is emerging as a ‘hot topic’ among academics.

Professor Lesley Wood, South Africa

All development practitioners and students should study this book carefully, as should aid bureaucrats and aid donors.

Dr Chad Perry, Australia

In this book Ortrun Zuber-Skerritt and Richard Teare invite us to re-think, re-evaluate and re-create our views of learning.

Associate Professor Doris Santos, Colombia

In this new book, the authors present challenging and original models for encouraging community and social development work. Drawing on a Lifelong Action Learning (LAL) approach, they challenge Western-dominated approaches to learning, encouraging the development of local solutions for local needs.

Dr Pip Bruce Ferguson, New Zealand

By bringing education to the people, rather than people to education, they create the possibility for real personal, organizational and community learning on-the-ground in developing countries.

Dr Ron Passfield, Australia

The genius of this book is its simplicity. It provides a sound approach to addressing the holes in our mainstream approaches to education, training, development and in living together in communities, through providing a new understanding of ‘lifelong action learning’ and how to achieve it through proactively cultivating and passing on local knowledge.

Dr Frank Thompson, Africa

I believe this book has the potential to transform the century old teaching and learning paradigm that is failing many countries to one that is futures oriented and transformational in nature. This is a book that all educators need to read and to consider within their own learning context.

Dr Margaret Fletcher, Australia

This book will be useful to international community developers, educators and researchers – especially if they are looking for alternative ways of successfully improving living conditions for disadvantaged and subsistence communities.

Associate Professor Wendy Rowe, Canada
Many indigenous cultures maintain a tradition with roots in the idea of ‘the circle of friendship’. In this understanding, by treating our friendship as a gift to people who are special to us, our friendship with them will last forever. Community members therefore meet regularly around an open fire to share ideas and celebrate the peace, friendship and care among them.

_Lifelong Action Learning_ (LAL) has its roots in a similar understanding. As this book explains, people learn with and from each other through collaborative first-hand experience and reflecting upon it. They pass on their learning to others to cascade the knowledge they have created and their understanding of how to learn continuously – through LAL. The solidarity, enlightenment and sharing of ideas depicted on the cover of this book are true to the philosophy of LAL for community development and ultimately a better world for all.
Lifelong Action Learning for Community Development
Learning and Development for a Better World

By
Ortrun Zuber-Skerritt
Griffith University, Brisbane, Australia

and

Richard Teare
Global University for Lifelong Learning, California, USA

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# TABLE OF CONTENTS

Foreword vii  
*Sir Paulias Matane*

Acknowledgements xi

Reviewers’ Comments xiii

About the Authors xix

List of Tables xxi

List of Figures xxiii

List of Appendices xxv

List of Acronyms xxvii

**Part I: Introduction to Lifelong Action Learning (LAL) in Theory and Practice** 1

Chapter 1. A New Conceptual Framework for Learning and Development in the Twenty-first Century 3  
*Ortrun Zuber-Skerritt*

Chapter 2. How to Develop Lifelong Action Learning 29  
*Ortrun Zuber-Skerritt*

**Part II: Mobilizing Rural Communities** 65

Chapter 3. Building a Case for Evidence-Based Learning 67  
*Richard Teare*

Chapter 4. Personal Viability – The Journey to Self-Reliance and Financial Independence 99  
*Richard Teare*

Chapter 5. Church and Community Mobilization – A Process for Transformational Development 133  
*Richard Teare*
TABLE OF CONTENTS

Part III: Reflections and Conclusions 167

Chapter 6. Reflections and Insights on the GULL System through Video Technology 169
Ortrun Zuber-Skerritt and Richard Teare

Chapter 7. Reflections and Conclusions on Learning and Development for a Better World 221
Ortrun Zuber-Skerritt

Name Index 239

Subject Index 243
Why is this book about lifelong action learning so important? I would like to begin with an illustration from my own life. I was born in 1931 in a remote subsistence community in East New Britain Province, Papua New Guinea. As both my parents died when I was a young boy, I was raised by my elderly grandparents. My grandfather told me that if I wanted to succeed in life, I had to be focused, have a vision, set an objective, plan for it, and with total honesty, commitment and perseverance, I would reach my goal. I took up my grandfather’s challenge and at the age of over sixteen, I had the opportunity to go to school for the first time. I later became a Teacher, Headmaster, Schools Inspector and then National Superintendent of Teacher Education. After that, I served my country as a Permanent Secretary, an Ambassador, a High Commissioner, and as a Vice President of the United Nations General Assembly. On 26 May, 2004 I was elected as the Eighth Governor-General of Papua New Guinea.

Although my formal learning journey only began when I was a teenager, my dream was to achieve more than my limited educational opportunity would normally permit. The dream became a reality when I discovered for myself the power of lifelong action learning. At the age of 81, my life is still full of action, reflection and learning and my learning journals have been the fruitful resource for the books I have written about many aspects of life. I am currently working on my forty-ninth book.

ENABLING YOU TO MAKE A DIFFERENCE IN OUR WORLD

The story of this book about lifelong action learning and the role of the Global University for Lifelong Learning (GULL) began in August 2004 when I first met co-author, Professor Richard Teare in London. I had travelled from Papua New Guinea with my wife for a meeting with Her Majesty the Queen. At that meeting, Richard shared his vision for a practical and inclusive system that would enable the poor and the marginalized (the world’s majority) to experience for themselves, the life-changing potential of action learning. I had previously written on this subject (drawing on my own experience) and so we began a dialogue by email. We explored over a period of several years the ways and means that might be used to enable those without money and qualifications to participate in a new kind of global learning initiative. Richard knew from his own prior experience of academia that we would need a credible alternative to ‘validated’ or ‘accredited’ learning and our solution was to develop a Statement of Recognition that Grand Chief
FOREWORD

Sir Michael Somare, the Founding Prime Minister of Papua New Guinea, and I could sign and support on behalf of the Nation of Papua New Guinea. Our aim was to provide GULL with a mandate by recognizing its professional award system in perpetuity and you can view the Statement that we signed on 10 April, 2007 in the ‘Recognition’ section at the GULL website. After that, things moved quickly – Richard left paid employment to lead GULL and on Friday, 5 October, 2007, the formal launch of GULL took place in the State Function Room at National Parliament House in Port Moresby, the capital of Papua New Guinea. I am delighted that since then, GULL has been introduced to many countries and in most parts of the world. Now, thousands of people – year on year – use GULL to achieve remarkable outcomes for themselves, their families and communities.

GULL’s process deliberately avoids the need for expensive resources so that anyone can participate. GULL uses the term ‘pathway’ to reflect the fact that lifelong learning is a continuing journey of the human spirit. Above all, we wanted to offer a process that would enable participants to help themselves and then to help others – that is why we adopted the motto ‘Enabling YOU to make a difference in OUR world’. Among the many government ministers and organizational leaders around the world that have endorsed GULL, Sir Howard Cooke, former Governor-General of Jamaica used the most memorable phrase to describe GULL’s work. Richard met Sir Howard at his home in Jamaica in February 2008 and after explaining the concept of GULL, Sir Howard said that he believes that there is a ‘Genius of God’ in each and every person and that GULL’s approach to lifelong action learning would enable every GULL participant to discover and use their own unique ‘genius’ to help themselves and others. This is a concise and powerful summary of GULL’s mission. You can view Richard’s discussion with Sir Howard in the Media section at the GULL website.

LIFELONG ACTION LEARNING FOR COMMUNITY DEVELOPMENT

This book documents GULL’s dynamic journey since its inception and it draws on rural community applications in developing nations to illustrate the rich diversity of action learning that is enabling economically poor communities to attain self-reliance and financial independence. The theoretical framework is provided by Ortrun Zuber-Skerritt, one of the world’s most respected and experienced writers on action learning. Ortrun and Richard explain and demonstrate how indigenous systems – founded on traditional knowledge and cultures can be integrated with GULL’s pathways. This helps to systemize and professionalize holistic development and by linking outcomes to recognition and certification, large numbers of people – previously excluded from the opportunity to learn – are now able to participate and be recognized for their efforts. This truly is a dream come true!

This book is the first in what I hope will become a series of books that explain and illustrate the endless ways of engaging with communities. Its focus on engaging with rural communities in developing nations draws on GULL’s work in Papua New Guinea with the highly regarded ‘Personal Viability’ system and from
a multi-country application in East Africa. A second case study illustrates how a process called ‘Church and community mobilization’ is enabling hundreds of economically poor communities in East Africa to become self-reliant. A novel feature of the book is the wide range of accompanying resources that are freely available from the GULL website. They include eight videos – recorded specifically to support this book – featuring the voices and stories of GULL participants, indigenous system developers and analysts.

I am personally thrilled by GULL’s progress – a non-profit network movement that is principally designed for, and is being embraced by, the poor and marginalized people that share our fragile and interconnected planet. The reader should know that all proceeds from this book will be used to develop GULL’s work at grassroots level. I am also proud of the fact that GULL’s mandate originates in Papua New Guinea – this is our gift to the world.

I know that you will be encouraged, challenged and motivated by this book and after you have read it, I urge you to consider how you might collaborate with GULL and deploy its lifelong action learning methodology in support of the communities that you serve. This would be a very effective way of enabling YOU to make a difference in OUR world.

His Excellency Grand Chief Sir Paulias Matane
Eighth Governor-General of Papua New Guinea (2004–2010),
Founding Chancellor of the Global University for Lifelong Learning, USA
Kokopo, East New Britain, Papua New Guinea
December, 2012
ACKNOWLEDGEMENTS

Ortrun and Richard would like to thank critical friends who provided useful feedback on earlier drafts of the chapters and enhanced the quality of the book publication. In alphabetical order these are: Mary Brydon-Miller, Phil Crane, Bob Dick, Pip Bruce Ferguson, Margaret Fletcher, Judith Kearney, Ron Passfield, Chad Perry, Jo Anne Pomfrett, Wendy Rowe, Frank Thompson and Lesley Wood.

Richard Teare would like to thank the friends, colleagues, system developers, leaders and Global University for Lifelong Learning (GULL) participants who assisted in the preparation of the Part II chapters and videos. In alphabetical order they are:


Special thanks are due to Maureen Todhunter as copy editor, Matthew Teare as video editor and GULL website manager, and Jo Anne Pomfrett as proof reader.

This book is dedicated to Paulias Matane, Edward Mooney and Michael Somare for their vision and support for GULL, and to everyone who will take up the vision and benefit from putting it into practice within their communities and then cascading their learning to others.
REVIEWERS’ COMMENTS

‘Lifelong Action Learning (LAL) for Community Development: Learning and Development for a Better World’ manages to accomplish an almost impossible goal – to be both deeply inspirational and highly practical all at the same time. The authors make a strong case for the vital importance of lifelong action learning as a strategy for addressing global inequality and for encouraging community development that is respectful of local culture and conditions. This book provides a clear framework to guide this process of individual and community development, along with a wealth of useful methods that can be used to implement the approach, and case studies that illustrate how the basic principles of lifelong action learning can be applied in very different cultural and political contexts. One way of understanding the impact of any strategy for achieving positive change is in terms of what the authors here identify as cascading effects – the extent to which the work inspires others to action. Readers will find here an engaging invitation to become a part of this cascade of projects and partnerships committed to international community development focused on human well-being and positive social change.

Professor Mary Brydon-Miller, PhD, Director, Action Research Centre, and Professor, Educational Studies and Urban Educational Leadership, College of Education, Criminal Justice, and Human Services, University of Cincinnati, USA (Mary.Brydon-Miller@uc.edu)

I was sold on this book from the foreword – the need to rethink how we think about and ‘do’ education is emerging as a ‘hot topic’ among academics. Visionary scholars, such as the authors of this book, accept that our current approach to education is elitist, exclusive and denies the value of locally created knowledge, and by implication, those who created it. The dominant western epistemology continues to dictate ideas of what forms of knowledge are valid, who can create such knowledge and what should be done with it. This book shows how we can begin to challenge this knowledge hegemony by taking the university to the people. Zuber-Skerritt offers a wonderfully clear conceptual framework for lifelong action learning as a methodology to help community members to systematize and professionalize indigenous knowledge through taking action to improve their quality of life. Through convincing case studies Teare shows how this form of knowledge generation engages people in solving the ‘wicked’ problems of this world through following a systemic and validated process of action learning, guided by the Global University of Lifelong Learning programs. Certainly, this approach yields more positive benefits for community members than formal education that tends to “educate to earn a living” rather than educate for sustainable improvement in quality of life. This book will stimulate the ongoing discussion around community engagement and show that universities can work with communities without losing any of their credibility or power – in fact the opposite
is true as this type of work spawns vast amounts of data for research purposes. More importantly, it shows that the academy can partner with communities to increase and enhance the self-respect and dignity of those who have been historically marginalized by the epistemological hegemony of the academy.

Professor Lesley Wood, PhD, Research Professor, North-West University, Potchefstroom, South Africa (lesley.wood@nwu.ac.za)

I have worked as a development consultant in Africa and know first hand the difficulties involved. I therefore warmly recommend this book to all the people involved in community development within developing countries. It provides a conceptual foundation for its approach in ‘lifelong action learning for community engagement’, linking established ideas from many sources into a new way of thinking about development. It then provides a step-by-step process for implementing that new way of thinking. I especially like the case studies of how the approach has actually worked to develop successful business in informal economies in several countries. The two authors have an enormous depth of experience in the fields that they are writing about, and that adds to the credibility of what they are describing. All development practitioners and students should study this book carefully, as should aid bureaucrats and aid donors.

Chad Perry, PhD, Emeritus Professor, Australian Institute of Business, Adelaide, Australia (ninaeau@yahoo.com)

In this new book, Ortrun Zuber-Skerritt and Richard Teare present challenging and original models for encouraging community and social development work. Drawing on a Lifelong Action Learning (LAL) approach, they challenge Western-dominated approaches to learning, encouraging the development of local solutions for local needs. The book presents the philosophical underpinning and models of LAL for individual, organization and community development, then a range of case studies demonstrating original work done in a variety of countries (Papua New Guinea, and East African countries). The volunteers who worked in those contexts have been encouraged in their endeavours to provide extensive evidence-based descriptions that meet the assessment criteria for GULL, and have achieved certification at Certificate, Diploma, Masters or Doctoral level through GULL. The book addresses readers in the first person, and besides including URLs to resources and videos of case study participants and their work, contains both transcripts and appendices to support readers who may not have online access, but who want to learn from the examples.

Pip Bruce Ferguson, PhD, Teaching Developer, Teaching Development Unit, University of Waikato, New Zealand (pip@waikato.ac.nz or ferguson@xtra.co.nz)

‘Lifelong Action Learning (LAL) for Community Development: Learning and Development for a Better World’ was a fascinating and thought provoking read of alternative education techniques and community development goals. The authors weave together basic lifelong learning principles, with that of action inquiry and
community development projects; reinforcing at every stage the importance of engagement and professional recognition of local volunteers in efforts to improve their personal and community quality of life. This book will be useful to international community developers, educators and researchers – especially if they are looking for alternative ways of successfully improving living conditions for disadvantaged and subsistence communities. This book will be a necessary read for students in the MA Global Leadership program at Royal Roads University, Victoria, Canada.

Wendy Rowe, PhD, Associate Professor and Program Head, School of Leadership, Royal Roads University, Victoria, Canada (wendy.rowe@royalroads.ca)

In this book Ortrun Zuber-Skerritt and Richard Teare invite us to re-think, re-evaluate and re-create our views of learning. They introduce Lifelong Action Learning (LAL) as an effective approach to sustainable community development so that by working collaboratively and mindfully we can transcend current educational paradigms to help improve human life, especially among those in greatest need. They describe, explain and illustrate how LAL values, such as authentic solidarity, respect, self-respect, and appreciation of the richness of diverse ways of thinking and doing, can be put into action within communities to help unlock and empower human potential. The authors’ insights lead us to also re-think the constraints of dominant economic assistance models aimed at promoting the empowerment of poor and disadvantaged communities both in developed and not so developed societies. For the English-speaking world here is an inspiring book whose principles of action and learning coincide broadly with Latin American ways of approaching community empowerment, inspired by Paulo Freire and Orlando Fals Borda.

Doris Santos, PhD, Associate Professor, Universidad Nacional de Colombia, Bogota DC, Colombia (dasantosc@unal.edu.co)

The authors, Ortrun Zuber-Skerritt and Richard Teare, are highly credentialed in the formal academic world by virtue of their qualifications and experience. They use their resultant profound knowledge to reconceptualize accredited learning as lifelong action learning within the context of communities within developing countries. As with any new paradigm, their writing and work on the ground reinvigorates the established concept of accredited learning and extends its meaning to incorporate learning within organizations and community that achieves verifiable personal and organizational/community outcomes. In this way, they are able to give access to accredited learning to the great majority of people who are unable to access the formal education system. By bringing education to the people, rather than people to education, they create the possibility for real personal, organizational and community learning on-the-ground in developing countries. At the same time, they challenge each of us to embrace the new paradigm of lifelong
REVIEWERS’ COMMENTS

action learning within our own context and to support their efforts to bring
education to the many millions of people in developing countries.
Ron Passfield, PhD, Organizational Consultant and Freelance Social Media
Manager, Merit Solutions Pty Ltd (rpassfield@optusnet.com.au)

As a development practitioner, I have found myself in the middle of training
courses thinking ‘I understand what I’m being taught – but I have no idea how I’ll
be able to apply it back in the office – or out in the field’. I have observed this
situation continually in the cross-cultural training context. I have struggled to work
out where to start to implement training courses in many complex development
situations. When working in a community that is at war with itself – where does
one begin? Now I have an answer. The genius of this book is its simplicity. It
provides a sound approach to addressing the holes in our mainstream approaches to
education, training, development and in living together in communities, through
providing a new understanding of ‘lifelong action learning’ and how to achieve it
through proactively cultivating and passing on local knowledge. By effectively
bringing together proven methodologies/approaches – action learning and action
research, community development, cross-cultural theories and lifelong learning –
this work provides a clear way forward for development that has two distinctive
strengths. It is self sustaining – enabling real progress that will not fall over once
interventions stop – and it is self developing – unlocking human potential to deal
with the complex and turbulent C21.
Frank Thompson, PhD in management of international development programs, has
worked in development for more than 15 years in government, NGOs and as a
consultant. He currently delivers programs in Africa
(frank_thompson@ausaid.gov.au or fthompsonassociates@yahoo.com.au)

This book presents an enlightening account of the use of action learning in
developing countries. It is characterized by the integration of concepts, theory,
practice and detailed easy-to-use processes, all in the service of empowerment for
the often disadvantaged and neglected in the third world.
Bob Dick, DLitt, Adjunct Professor, Southern Cross University, Australia
(bd@bigpond.net.au or bobdick@mac.com)

As a critical reader and having responded to the content in each of these chapters, I
believe this book has the potential to transform the century old teaching and
learning paradigm that is failing many countries to one that is futures oriented and
transformational in nature. The coming together of organizations and communities
described here demonstrates how people power is enabled through a paradigm shift
that centres the learner and community in a process-oriented approach to managing
change. The partnerships that create these learning opportunities recognize the
inherent value of self-directed, facilitated learning. The challenge now is for the
entrenched education paradigm to recognize these partnerships as alternative and
valid education providers. This is a book that all educators need to read and to consider within their own learning context.

Margaret Fletcher, PhD, Adjunct Senior Lecturer, Griffith University, Australia
(m.fletcher@griffith.edu.au or margaretfletcher.01@gmail.com)

I read this book without prior knowledge of the subject matter. Despite this, I found the book engaging and easy to read and understand. I particularly appreciated the inclusion of diagrams and flow charts, which helped elucidate the concepts in a simple visual way. The concepts and their realization as described in the book present a very persuasive argument for their implementation and utilization. The multiple aims of personal growth and community enhancement are admirable and the book demonstrates the benefits and advantages that adoption of these systems can provide. The reflections of the participants make clear the very positive effects of Lifelong Action Learning. One commented that ‘when I studied and graduated, I thought that learning was just in the four corners of the room, but through this process, I really come to know – learning is everywhere’. Dr Ortrun Zuber-Skerritt and Dr Richard Teare and their colleagues in GULL are doing commendable work, not only through providing people with the means for improving their subsistence, but by giving them ways to enrich their life experience through these lifelong learning methods which in turn enables them to pass their knowledge on to others. As Dr Zuber-Skerritt states the book is future-oriented and I hope it can go on to help many more people.

Jo Anne Pomfrett, BA (Hons), GradDip Museum Studies, Consultant Museum Curator, Writer and Researcher, Queensland, Australia (pomfrettja@hotmail.com)
ABOUT THE AUTHORS

Ortrun Zuber-Skerritt is Director of OZI (Ortrun Zuber International P/L), specializing in action learning and action research, leadership development programs and postgraduate research training and supervision, including qualitative research methods. She is also Adjunct Professor at Griffith University (Brisbane, Australia); Professor Extraordinaire at Tshwane University of Technology (Pretoria, South Africa); and Regional President Australasia, Global University for Lifelong Learning (GULL). After her under- and postgraduate studies in Germany, she obtained four doctoral degrees since living in Australia: PhD in Literature (University of Queensland), PhD in Higher Education (Deakin University), DLitt in Management Education (International Management Centres Association), and an Honorary Doctor of Professional Studies (GULL). Ortrun has published 35 books, 45 book chapters, over 100 articles and papers, and 45 video programs related to postgraduate education, action learning and action research. She has been awarded over $1 million in R&D grants and led projects on ways of improving learning, teaching and management in all the universities in Queensland and in other Australian states, as well as in institutions in New Zealand, Hong Kong, Singapore, Japan, Fiji, Sweden, Holland, Austria, Germany, England, South America and South Africa.

Richard Teare, PhD, DLitt, KNSB is President, Global University for Lifelong Learning (GULL) which he co-founded in 2007. Richard has been committed to work and community-based learning since the mid-1990s and he has helped to create learning and development applications for a wide variety of organizations in different parts of the world. Prior to his current role, he held professorships at four UK universities and his academic publications include 20 co-authored and edited textbooks on aspects of service management, marketing and organizational learning. In 2010, Richard was initiated as an honorary Chief by the Masi sub-clan, Lihir Islands, Papua New Guinea, received the Royal Award of the King of Surakarta, Indonesia and was awarded the honorary Title of Gaurawacharya (Teacher of Honour) by the South Asian Academy for Good Governance in Sri Lanka. In 2012, he received a Knighthood from the Royal Order of the Noor of Buayan, Sultanate of Buayan, Philippines, in recognition of GULL’s work with communities around the world. Full details of GULL’s work can be found at the website: www.gullonline.org
# LIST OF TABLES

<table>
<thead>
<tr>
<th>Table</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Comparison between LAL and traditional education</td>
<td>17</td>
</tr>
<tr>
<td>3.1</td>
<td>Education and life skills: A transition to evidence-based learning</td>
<td>79</td>
</tr>
<tr>
<td>3.2</td>
<td>GULL forms to gather and track individual learning outcomes</td>
<td>86</td>
</tr>
<tr>
<td>3.3</td>
<td>Annual TRACA cycle steps</td>
<td>89</td>
</tr>
<tr>
<td>3.4</td>
<td>Level 2: Personal skills development – indicative outcomes</td>
<td>93</td>
</tr>
<tr>
<td>3.5</td>
<td>Level 2: Technical skills development – indicative outcomes</td>
<td>93</td>
</tr>
<tr>
<td>3.6</td>
<td>Level 5: Personal skills development – indicative outcomes</td>
<td>94</td>
</tr>
<tr>
<td>3.7</td>
<td>Level 5: Technical skills development – indicative outcomes</td>
<td>94</td>
</tr>
<tr>
<td>4.1</td>
<td>Calculating the individual FABP (in Kina)</td>
<td>113</td>
</tr>
<tr>
<td>4.2</td>
<td>Level 4: Calculating the family FABP (in Kina)</td>
<td>114</td>
</tr>
<tr>
<td>4.3</td>
<td>Lihir PV participants’ financial results: June–December 2011 (in Kina)</td>
<td>123</td>
</tr>
<tr>
<td>5.1</td>
<td>Key outcomes: Stages 1–6 inclusive</td>
<td>149</td>
</tr>
<tr>
<td>5.2</td>
<td>CCMP participants in East African nations (Kenya, South Sudan, Sudan, Tanzania, Uganda) 2001–2012</td>
<td>150</td>
</tr>
<tr>
<td>5.3</td>
<td>CCMP project outcomes in East African nations (Kenya, South Sudan, Sudan, Tanzania, Uganda) 2001–2012</td>
<td>151</td>
</tr>
<tr>
<td>6.1</td>
<td>Summary of issues arising in videos 1–8 and Chapters 3–5</td>
<td>181</td>
</tr>
<tr>
<td>7.1</td>
<td>Principles/values and activities for developing lifelong learning action</td>
<td>224</td>
</tr>
</tbody>
</table>
LIST OF FIGURES

1.1 Lifelong action learning: the synthesis of lifelong learning and action learning 16
1.2 A model of lifelong action learning for unlocking human potential 18
1.3 Mind map of this book 24
2.1 Model of a systematic reflection diary process 32
2.2 A student’s snake diagram 35
2.3 Figure eight: the process of project design and management 48
2.4 Principles and activities for developing lifelong action learning 52
3.1 Developing professionalism in context 69
3.2 Does the organizational culture facilitate learning? 70
3.3 Is the concept of personal professionalism valued? 72
3.4 Is the philosophy of self-directed learning accepted? 73
3.5 Is evidence-based learning prioritized? 75
3.6 Evidence of learning and ROI 76
3.7 The benefits of a self-directed action learning process combined with evidence-based professional certification 77
3.8 Life skills action learning 79
3.9 Facilitating wider community engagement in active learning 80
3.10 Progressive holistic development and professional certification 82
3.11 Capacity building cascade design 85
3.12 Capacity building pathway for community volunteers 86
3.13 Community-led ROI impact tracking 87
4.1 PV’s approach to developing competence and character 105
4.2 Attaining personal alignment 107
4.3 Scheme of self-reliance and financial independence: PV–GULL levels 1–7 inclusive 109
4.4 PV’s approach to developing thinking skills 111
4.5 The EDTC sustainable development model 112
4.6 Calculating family needs 115
4.7 PV’s equation for sustainable development 117
5.1 Implementing CCMP with GULL 141
5.2 CCMP–GULL cascade 143
5.3 Linking CCMP outcomes to GULL professional certification 145
5.4 Tracking and verifying CCMP outcomes 148
7.1 A model of learning and development for a better world 228
7.2 A model of facilitating and cascading individual and social change 232
# LIST OF APPENDICES

<table>
<thead>
<tr>
<th>Appendix</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>Daily Summary</td>
<td>55</td>
</tr>
<tr>
<td>2.2</td>
<td>Weekly Summary</td>
<td>56</td>
</tr>
<tr>
<td>2.3</td>
<td>Monthly Summary</td>
<td>59</td>
</tr>
<tr>
<td>2.4</td>
<td>“Turning Point Exercise”: An Activity for Building Relationships in Small Groups</td>
<td>62</td>
</tr>
<tr>
<td>3.1</td>
<td>GULL’s Approach to Outcomes Mapping</td>
<td>92</td>
</tr>
<tr>
<td>3.2</td>
<td>The GULL Code of Practice</td>
<td>96</td>
</tr>
<tr>
<td>4.1</td>
<td>A Profile of Samuel Tam and the Entrepreneurial Development Training Centre (EDTC) Ltd</td>
<td>125</td>
</tr>
<tr>
<td>4.2</td>
<td>Are You Viable?</td>
<td>127</td>
</tr>
<tr>
<td>4.3</td>
<td>PV–GULL Levels of Certification, Related Outcome Requirements and the Means of Verification</td>
<td>128</td>
</tr>
<tr>
<td>4.4</td>
<td>Weekly Praxis Report</td>
<td>130</td>
</tr>
<tr>
<td>4.5</td>
<td>The Balance Sheet of Life: Reconciling Human Assets and Liabilities</td>
<td>131</td>
</tr>
<tr>
<td>5.1</td>
<td>Profiles of Jonas Njelango and Francis Njoroge</td>
<td>154</td>
</tr>
<tr>
<td>5.2</td>
<td>Stage-related CCMP Outcome Indicators</td>
<td>156</td>
</tr>
<tr>
<td>5.3</td>
<td>Indicators for Monitoring and Evaluating Change</td>
<td>159</td>
</tr>
<tr>
<td>5.4</td>
<td>Stage-related CCMP–GULL Recognition and Certification</td>
<td>161</td>
</tr>
<tr>
<td>5.5</td>
<td>CCMP East Africa: Tracking and Reporting</td>
<td>163</td>
</tr>
<tr>
<td>5.6</td>
<td>CCMP East Africa: Objectives, Indicators and Tracking</td>
<td>164</td>
</tr>
<tr>
<td>6.1</td>
<td>Transcripts of Videos</td>
<td>186</td>
</tr>
<tr>
<td>6.2</td>
<td>Outline of the GULL Website</td>
<td>210</td>
</tr>
</tbody>
</table>
## LIST OF ACRONYMS

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Full Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAR</td>
<td>Annual Administrator Report</td>
</tr>
<tr>
<td>ADP</td>
<td>Area Development Program</td>
</tr>
<tr>
<td>AL</td>
<td>Action Learning</td>
</tr>
<tr>
<td>ALAR</td>
<td>Action Learning and Action Research</td>
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<tr>
<td>ALD</td>
<td>Action Leadership Development</td>
</tr>
<tr>
<td>APEC</td>
<td>Asia Pacific Economic Cooperation, including the US, Japan, China, Australia, Indonesia, Hong Kong, and Thailand.</td>
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<tr>
<td>AR</td>
<td>Action Research</td>
</tr>
<tr>
<td>CCMP</td>
<td>Church and Community Mobilization Process</td>
</tr>
<tr>
<td>CCRePs</td>
<td>Church and Community Resource Persons</td>
</tr>
<tr>
<td>CDC</td>
<td>Community Development Committee</td>
</tr>
<tr>
<td>CEO</td>
<td>Chief Executive Officer</td>
</tr>
<tr>
<td>CM</td>
<td>Community Mobilization</td>
</tr>
<tr>
<td>CoP</td>
<td>Code of Practice</td>
</tr>
<tr>
<td>DF</td>
<td>Diary Format</td>
</tr>
<tr>
<td>DRC</td>
<td>Eastern Democratic Republic of Congo</td>
</tr>
<tr>
<td>ECO</td>
<td>Environmental Children’s Organization</td>
</tr>
<tr>
<td>EDTC</td>
<td>Entrepreneurial Development Training Centre</td>
</tr>
<tr>
<td>FABP</td>
<td>Financial Asset Break Point</td>
</tr>
<tr>
<td>FGM</td>
<td>Female Genital Mutilation</td>
</tr>
<tr>
<td>GNI</td>
<td>Gross National Income</td>
</tr>
<tr>
<td>GULL</td>
<td>Global University for Lifelong Learning</td>
</tr>
<tr>
<td>ICT</td>
<td>Information and Communication Technologies</td>
</tr>
<tr>
<td>IGT</td>
<td>Information Gathering Team</td>
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<tr>
<td>INA</td>
<td>Papua New Guinea Institute of National Affairs</td>
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<tr>
<td>IPPR</td>
<td>Institute for Public Policy Research</td>
</tr>
<tr>
<td>K</td>
<td>Kina (Papua New Guinea monetary unit)</td>
</tr>
<tr>
<td>LAL</td>
<td>Lifelong Action Learning</td>
</tr>
<tr>
<td>LCG</td>
<td>Local Coordinating Group</td>
</tr>
<tr>
<td>LL</td>
<td>Lifelong Learning</td>
</tr>
<tr>
<td>LPAL</td>
<td>Lifelong Performance and Action Learning</td>
</tr>
<tr>
<td>LSDL</td>
<td>Lihir Sustainable Development Ltd</td>
</tr>
<tr>
<td>MOOC</td>
<td>Massive Open Online Course</td>
</tr>
<tr>
<td>MoV</td>
<td>Means of Verification</td>
</tr>
<tr>
<td>NESB</td>
<td>People from Non-English Speaking Backgrounds</td>
</tr>
<tr>
<td>NGO</td>
<td>Non-Government Organization</td>
</tr>
<tr>
<td>NGT</td>
<td>Nominal Group Technique</td>
</tr>
<tr>
<td>OECD</td>
<td>Organization for Economic Cooperation and Development</td>
</tr>
<tr>
<td>PAG</td>
<td>Pentecostal Assemblies of God churches</td>
</tr>
<tr>
<td>PALAR</td>
<td>Participatory Action Learning and Action Research</td>
</tr>
<tr>
<td>PD</td>
<td>Professional Development</td>
</tr>
</tbody>
</table>
LIST OF ACRONYMS

PEP Participatory Evaluation Process
PLS Personal Learning Statement
PNG Papua New Guinea
PV Personal Viability
QA Quality Assurance
QABP Quantity Asset Break Point
QAR Quarterly Administrator Report
QFR Quarterly Facilitator Report
QUAL Queensland University Action Learning
R&D Research and Development
RO Return on (Learning) Outputs
ROI Return on Investment
SMC School Management Committee
SOSF Scheme of Self-Reliance and Financial Independence
SROI Social Return on Investment
SWOT Strengths, Weaknesses, Opportunities, Threats
TRACA Tracking, Review and Corrective Action
TED Technology, Education, Design
UNEP United Nations Environment Program
UNESCO United Nations Educational, Scientific, and Cultural Organization
WCED United Nations World Commission on Environment and Development
WV World Vision (NGO)
WVI World Vision International
WVK World Vision Kenya
PART I: INTRODUCTION TO LIFELONG ACTION LEARNING (LAL) IN THEORY AND PRACTICE

Ortran Zuber-Skerritt

To all those of every age, every country, and every creed committed to making lifelong learning a reality for all in the confidence that “this world one day will be the type of world we all deserve”.

(Nelson Mandela, anti-apartheid revolutionary and first black President of South Africa, 1994–1999)

This first part consists of two chapters, a theoretical (Chapter 1) and a practical (Chapter 2).

Chapter 1 provides a theoretical framework for the integration of the main concepts of action learning and lifelong learning, an explanation of a new paradigm of learning and development as an alternative to (but not in competition with) the formal educational system: a paradigm that is self-directed, empowering, sustainable and urgently needed in this complex and turbulent world in the twenty-first century. It builds on and continues discussion from Ortran’s previous work on Action Research for Sustainable Development in a Turbulent World (Emerald Books, UK, 2012).

Chapter 2 is practical in its approach to developing lifelong action learning by including guidelines, processes and exercises that can be used for action and reflection by individuals and then shared in small groups or ‘action learning sets’. It helps readers to understand and learn how to design, conduct and continuously evaluate an action learning program or project.
CHAPTER 1

A NEW CONCEPTUAL FRAMEWORK FOR LEARNING AND DEVELOPMENT IN THE TWENTY-FIRST CENTURY

Ortrun Zuber-Skerritt

Education is the most powerful weapon, which you can use to change the world.

(Nelson Mandela, anti-apartheid revolutionary and first black President of South Africa, 1994–1999)

Learning does not mean to fill a barrel, but to ignite a flame.

(Heraclitus, pre-Socratic Greek philosopher, sixth century BC)

OUTLINE

Chapter 1 provides a theoretical framework for integrating the main concepts of action learning and lifelong learning into Lifelong Action Learning (LAL). After introducing the authors’ backgrounds and the book’s rationale, aims and approach, this chapter explains LAL as a new paradigm of learning and development at work, as an alternative to, but not in competition with, the formal educational system. This paradigm appreciates the true worth of indigenous knowledge, which is self-directed, empowering, sustainable, and urgently needed in our complex and turbulent world in the twenty-first century. Through this paradigm, the chapter focuses on new ways of developing creative learning and thinking ‘outside the box’ that are appropriate for poorer communities and as alternatives or complements to, or thought-provoking change from, formal education. As the twenty-first century evolves with increasing globalization, complexity and turbulence, we need this new paradigm of learning and development to address totally new and complex problems collaboratively and effectively. In particular, we need to work with the deeply poor and disadvantaged – the majority of people on this earth – to enable these people to help themselves. Through LAL they can develop confidence, capability and character, as well as understanding of learning, for sustainable personal and community development.
CHAPTER 1

INTRODUCTION

This book explains Lifelong Action Learning (LAL) for community development, particularly in poor communities, on the principles of self-help and sustainability. It is written for those familiar with, or new to, the field of community development. It is for users of action learning and for practitioners, educators, facilitators, consultants, community workers and leaders in government and business. It is for communities, and for people responsible for staff and management development in organizations and/or interested in developing lifelong action learning principles in their own practices and in communities of need.

The concepts of lifelong learning and action learning have very long histories, with origins in the works of Aristotle and Plato (about 400–300 BC). These concepts have been rediscovered and developed in a growing literature over the past 60 or 70 years, starting with thinkers such as John Dewey (1938), Paolo Freire (1972), Orlando Fals Borda (1991, 1998), Reg Revans (1971, 1982, 1998, 2006) and Kurt Lewin (1926, 1948). The time for lifelong learning and action learning has now surely come. Yet, these concepts, independently and as a synthesis, need to be re-evaluated and re-conceptualized for the twenty-first century. We are now in a time of increasing complexity, ambiguity, turbulence, and tension among different values and beliefs – a time when the concepts of lifelong learning, action learning and LAL can make a valuable contribution to human life, learning and sustainability of the environments in which we live.

Through the final decades of the twentieth century it became increasingly important to cope with rapid changes in industry, commerce and consequently society. These changes were wrought largely through what is commonly termed ‘globalization’ and the growth, extension and application of knowledge through information technology. The Fauré Report (1972) was true to this time. It called for a new philosophy and re-conceptualization of education as a lifelong process, thus requiring constant reorganization or reconstruction of experience and knowledge.

Inside the twenty-first century, this call is even more urgent. The acceleration and increasing complexity of problems associated with disasters – human-induced such as through climate change, nuclear calamity, military incursion and racial conflicts; and natural such as through droughts, floods, tornados, volcanic eruptions, earthquakes, tsunamis and bushfires – inflict great destruction upon people and places. Despite great advancements in scientific knowledge and global economic partnerships, most people in the world are still exploited and trapped in extreme poverty, as wealth concentrates in the hands of a tiny circle. This book therefore addresses an extremely important question: how can people of great need, who have been denied opportunities for formal education, be helped to unlock their human potential so they can contribute to a better world – for themselves and for all of us? The book is helpful to all educators who work with people from ethnically and linguistically diverse communities, especially those with indigenous backgrounds.

We acknowledge that political and economic structures have been used to produce, sustain and intensify unequal distribution of wealth and opportunity across the globe. These structures are associated with the distribution of power by
and among nations, people and the groups in which they live or work together. This book does not offer political-economic analysis or suggest a political-economic remedy. Rather, it offers ways for enabling people who are disadvantaged by these inequalities to learn about their circumstances and address their problems collectively themselves. In this more indirect way it serves to address complex problems in the contemporary world through action learning and lifelong learning that people can practise at any time or place within their economic and political circumstances. We call this lifelong action learning.

This chapter first explains the authors’ backgrounds and the rationale, aims and approach of the book. It then gives working definitions of the often vague concepts of lifelong learning (LL), action learning (AL) and sustainable community development, and introduces the new concept of lifelong action learning (LAL) and a model of LAL for unlocking human potential. Finally, the chapter outlines the structure and content of the book.

BACKGROUND

Until now, my co-author, Richard Teare, and I have published separately. However, we have known each other, worked together at times, and used action learning principles for over 30 years in higher education, management education, leadership development, organization development and community development. We share the philosophical assumptions underpinning our methodology and practical work, that is, we are located in the same paradigm of learning and development and in a community of practice, i.e., a group of people who share professional knowledge and experiences with one another. Wenger (1998) maintains that learning is central to human identity that can be constructed through active participation in the practices of social communities. He succinctly defines communities of practice on his website as: “groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” (http://www.ewenger.com/theory/index.htm).

Having together identified that our reflections on our shared and independent experiences on lifelong action learning have much to offer others, Richard and I decided to co-author this book and to divide the tasks between us according to our interests and strengths. I focus on the general conceptual framework of learning and development – the what and why in this chapter – and on the development of lifelong action learning (LAL) – the how and when in Chapter 2 – generally in organizations such as businesses, corporations, government departments, communities and educational institutions. Richard links these theoretical principles and practical strategies of learning and development from organization development to community development in Chapter 3 on evidence-based learning and from the general to the specific applications and processes of self-directed, collaborative, creative and innovative learning: in Papua New Guinea in Chapter 4, and in Kenya, Tanzania, Uganda, Sudan and South Sudan in Chapter 5. The video interviews in Chapter 6 were conducted and recorded by Richard in the specific contexts of Chapters 3–5 and then summarized, reflected upon, evaluated and
CHAPTER 1

generalized by me. In the concluding Chapter 7, I have taken those same steps across all chapters in the book in an attempt to harvest its conceptual and practical lessons. In other words, in this book I contribute as the generalist in higher education and organization development. Richard contributes as the specialist in community development through the system of GULL – the Global University for Lifelong Learning – that he originally designed and founded.

GULL is a non-profit public benefit corporation registered in California (USA) and recognized in perpetuity by the Government of Papua New Guinea and endorsed by other national governments, leaders and institutions. GULL confers awards at the Certificate, Diploma, Bachelor, Master and Doctor levels. However, like other universities that operate outside the traditional higher education system, GULL qualifications are not automatically recognized within that system. This has consequences for GULL graduates seeking employment in countries where the GULL system is not recognized. However, in the tight, competitive labor market nowadays, employers in all sectors require verifiable evidence of job applicant achievements. The evidence-based learning approach of GULL, with its extensive documentation, certainly meets this need of employers and actually places GULL applicants in a position of advantage over other applicants who often cannot provide such evidence of this type of practical learning and capacity building.

GULL works with local, national and global non-government agencies and other organizations, including churches, to provide its practical, professional development system to communities that would not otherwise have access to further and higher education. We also work with companies that are seeking to create a sustainable future for their workforce. GULL currently has a presence in more than 40 countries and this is set to increase in future years as new affiliations with global organizations take root. GULL’s work in many places is relatively new and small-scale but in regions like East Africa, the number of participants has grown from a small group in 2009 to large numbers of participants in 2013.

The diverse range of activity can be illustrated with reference to some of the current initiatives. For example, in Malaysia and in China, GULL has numerous corporate partnerships in the services sector (e.g., health and beauty care and real estate) and elsewhere the collaboration with World Vision embraces parts of Africa, South Asia, the Middle East and Latin America. In these and in many other places, GULL is deliberately seeking to create a global network movement with very low central operating costs so as to ensure that GULL can achieve its mission to the low paid, the marginalized and the world’s economically poorest people. The mission reads: “GULL is dedicated to enabling YOU to make a difference in OUR world. GULL’s practical approach to personal and professional development uses self-directed action learning to help individuals, communities and organizations to sustain learning and apply the outcomes” (www.gullonline.org).

In moving through this book, readers may notice differences between the two authors’ writing styles, mine in Chapters 1, 2, 6 and 7, and Richard’s in Chapters 3–5. We first considered this as potentially a shortcoming and discussed using a professional editor to make language use consistent throughout the book. In more advanced thought we decided against this since in the tradition of action learning
and action research (ALAR) we value difference and personal autonomy and respect all authors' individual voices. We have therefore distinguished and identified the author of each chapter in the respectful spirit of ALAR. The next section outlines the rationale, aims and approach of the book.

RATIONALE, AIMS AND APPROACH

This book on developing Lifelong Action Learning (LAL) is about encouraging and helping to enable all people, especially in the poorest and most disadvantaged communities in our world, to develop their learning potential by discovering their special gifts, cascading their learning, and developing these gifts together with other like-minded people. This is the means to become self-confident, self-directed and then to help others on the same learning journey. Exploring holistic development, capacity building and community development or mobilization, the book uses the vehicle of LAL to address these questions that are vital for the wellbeing of the world’s poor:

– How can the world’s poorest communities become self-sufficient and thriving?
– How can they learn from multiple sources, including ones that are not recognized as formal educational institutions, such as successful corporations and their own communities?
– How can they best take control of their own livelihood, destiny and natural endowment to contribute to sustainable development of their communities and by extension to global wellbeing?

There are many handbooks, textbooks, monographs, and edited and authored books dealing discretely with community development or action learning or action research or lifelong learning. This book is the first to integrate these concepts in a unique, coherent and holistic approach to unlocking human potential in individuals, groups, communities and organizations, so they can individually and collectively contribute to identifying and solving problems. We discuss relevant aspects of the literature on these subjects and then take readers beyond as we further develop the paradigm to help address human needs as the twenty-first century unfolds. Our conceptual and practical discussions explain new educational pathways from exclusion to inclusion; unknowing to self-directed learning and knowledge creation; dependence and oppression to independence and freedom; self-consciousness to self-confidence; individualism to collectivism; self-centredness to other-centredness; and so forth. The following books (by order of publication year) on learning and development might be regarded as competitors but we consider them as complementary to this present book: Teare, Davies and Sandelands (1998), Reason and Bradbury (2001, 2006, 2008), Longworth (2003), McGill and Brockbank (2004), Burns (2007), Raelin (2008), Trilling and Fadel (2009), Dilworth and Boshy (2010), Bellanca and Brandt (2010), Jackson (2011), Ledwith (2011), Jarvis (2011), Robinson (2010, 2011), Taylor (2011), Wagner (2012), Zuber-Skerritt (2009, 2011, 2012) and Berryman, SooHoo and Nevin (2013). We discuss these throughout the book.
Our book ranges widely and comprehensively. To some extent it represents an evolution of our own lifelong thinking, action and learning and recent reflection upon all three. Here we have directed our learning through action and reflection particularly to address what is a primary concern to people living in poverty: how can they better meet their needs through their own action and learning – that is, through lifelong action learning? We identify and illustrate how lifelong action learning can be used most effectively to suit the needs and wherewithal of those who have had little opportunity to learn through formal education systems and who have much need for the practical and other positive outcomes they can achieve themselves through this new approach to learning.

We therefore seek to complement other learning/reading and reflection on alternative paths to community development by including features that we believe enhance this book’s utility in applying lifelong action learning for community development and further developing it conceptually. This book:

1. integrates the concepts of ‘lifelong learning’ and ‘action learning’ into Lifelong Action Learning (LAL) as an enabling framework for sustainable community development;
2. explains the paradigm and philosophical assumptions underpinning work-based LAL in an accessible language;
3. provides a step-by-step guide on how to unlock human potential through LAL, especially in groups of people who have not had opportunities for a solid education, or who cannot afford higher education expenses, or who by nature/culture prefer natural learning by doing, trial and error, reflection on action and discussion/collaboration with others, rather than individual academic study and classroom instruction;
4. has case studies with examples and anecdotes from poor communities in several developing countries, illustrating the diverse ways in which LAL has been applied and can be adapted; and
5. develops insights into development, mobilization and transformation in these communities and how they track and evaluate the change they have induced through lifelong action learning.

Like the work of Berryman et al. (2013), which uses culturally responsive and socially responsible methodologies, the present book challenges traditional research notions of the distant, neutral and ‘objective’ observer. Instead it offers an alternative characterized by relationships, subjectivity, collaborative research, participatory action research, co-construction of knowledge and pursuit of mutual good. We believe this alternative methodology makes the relationships, research and development outcomes of LAL more engaged, more ethical and more effective than those of other methodologies. It requires the researcher/developer’s ability to listen to and communicate with participants about their problems and concerns within their own context, to establish mutually respectful relationships of reciprocity and to encourage and facilitate participants’ vision building and agency for positive change.

and the Revolution Ahead, argues for a deep, rapid and urgent transformation that is required in this twenty-first century in higher education as much as in school systems globally. But it does not offer learning strategies as alternatives to the mainstream institutions such as universities and colleges, as this book does. In the concluding Chapter 7 we address the key issue of rapid and radical change raised in the IPPR report.

The present book is future-oriented. The needs it addresses through learning processes are increasing worldwide – not just among the poorest people, who are by far the majority on earth, and other disadvantaged communities. Today a growing spread of people are afflicted by job/income loss and consequent disabling circumstances as wealth is transferred and concentrated in the hands of an ever smaller cohort across and within mostly developed, but to a minimal extent also developing, countries. There is a growing awareness among some educators and leaders globally that social justice, collaboration, inclusion and equity of peoples on this planet are vital to helping solve economic, social and political problems in this twenty-first century, from the consequences of global climate instability to terrorism, dictatorial regimes, racial/religious tensions and so forth. These natural and human-induced disasters parallel and magnify the consequences of neoliberal policies by national governments and international institutions that feed profit-hungry corporations and expand the gap in wealth distribution. Hence, today in countries worldwide growing grassroots movements and some communities are rejecting the economic models that fuel big business at the expense of the poor, and are working together to produce their own food, downsize their consumption and simplify their lifestyles – buying locally, reducing their greenhouse footprint, managing resources mindfully and taking other steps towards achieving the common good.

As I have argued in my recent book (Zuber-Skerritt, 2012), traditional research and development strategies alone are not sufficient for worldwide problem-solving and sustainable development. These strategies need to be supplemented with creative initiatives, innovations and prompt on-the-ground action, all based on values grounded in pursuit of the common good through principles upholding non-hierarchical and democratic processes, personal courage, and a shared commitment to helping others – other-centredness instead of self-centredness. The strategies need to proceed from recognition that people on the ground are invaluable sources of local knowledge, wisdom and insight, who should be called upon for problem-solving and new knowledge creation. This requires flexibility and creativity. As Ken Robinson (2010) explains: “schools kill creativity”. We need to reawaken in adults the creative minds (Robinson, 2011) and capacity for initiative ‘by doing’ that they were encouraged to relinquish in childhood. Doing entails trial and error, taking risks, working collaboratively and being ‘creative innovators’ (Wagner, 2009) inventing new ways of doing, knowing and being. This requires self-directed lifelong learning and situational decision-making and action, rather than rote learning and adhering to strict rules that often impede progress and rapid positive change. What do we mean by lifelong learning?
LIFELONG LEARNING (LL)

As the two words indicate, lifelong learning entails learning throughout one’s life course, ‘from cradle to grave’ or ‘from birth to death’. We take lifelong learning as an approach to life and to learning – one that upholds the need to consciously pursue learning and make use of these lessons continuously along life’s journey. In this way, learning evolves. One of the best and most comprehensive understandings of lifelong learning has been offered by Peter Sheehan (2001) in his Foreword to the Kluwer International Handbook of Lifelong Learning:

*Lifelong Learning* is a concept that is critically important to all educators, for it expresses the importance and relevance of learning at every stage of our development. The concept is equally relevant to members of our society at all stages of their life-span – as young children, maturing youth, adults and as older persons. Further, it affects national governments, industry, information agencies and nearly every kind of institution of learning.

So important is the concept, it should be seen by all of us as representing a new philosophy of education and training, one that aims to facilitate a coherent set of links and pathways between work, school and education, and [to] recognize the necessity for government to give incentives to industry and their employees so they can truly “invest” in lifelong learning. It is also a concept that is premised on the understanding of a learning society in which everyone, independent of race, creed or gender, is entitled to quality learning that is truly excellent. (p. xi)

This philosophy of learning requires new models and strategies not just of learning but also of teaching, with a focus on learning rather than teaching, and recognition that learners have to take responsibility for their own learning. This means they have to learn how to think critically and solve problems, how to discover and construct knowledge for themselves, and become members of ‘communities of learning’. The term is a metaphor for understanding how people work through and with each other, in a group or organization, to address latent and emergent needs. Together they develop collaborative and interdependent processes that enable them to solve new, complex problems and adapt effectively to our turbulent and uncertain world. Crucially this learning process requires that all people be given opportunities to learn how to learn, individually and collectively.

Aspin et al. (2001) in their Introduction to the Kluwer Handbook mentioned above consider lifelong learning as a multi-faceted process and a complex relationship between three major elements or outcomes of lifelong learning that can be comprehensively summarized as follows.

1. *Education for a more highly skilled workforce* as an economic justification for lifelong learning, instrumental to achieving an extrinsic goal and a declared policy of international bodies (e.g., OECD, UNESCO, APEC, European
Parliament, the Nordic Council of Ministers and many national governments such as those in Australia, China, Japan, Korea, Taiwan and the UK).

2. **Education for personal development** leading to a more rewarding life as an intrinsically valuable activity for living with a worldview that is outside mainstream. This view has been adopted by a variety of community groups, especially indigenous groups in developing countries and in many other national contexts.

3. **Education for creating a stronger and more inclusive society**, based on the view that education is a public good, a prerequisite for effective participation in society by all citizens, and a process that begins at home and in pre-school, continues through compulsory and post-compulsory formal education, and is carried on through the rest of the lifespan.

We, the authors of this book, are concerned about all of these outcomes. Like Bagnall (2004), we are also concerned about the ethical impact of lifelong learning ideology and advocacy on education in the contemporary context. Bagnall defines the ethical or ethics as pertaining to “cultural imperatives to act in one way or another for the common good” (p. 9). Reviewing the literature published over the last four or five decades, Bagnall (2004) identifies the origins of lifelong learning in three particular progressive sentiments:

1. The *individual* progressive sentiment seeking individual growth and development, and liberation from ignorance through empowerment;

2. The *democratic* progressive sentiment committed to “social justice, equity and social development through participative democratic involvement, … directed particularly to the liberation of oppressed, marginalized and exploited sectors of society” (p. 2); and

3. The *adaptive* progressive sentiment defined by its programmatic responsiveness to cultural change, seeking liberation from poverty and from dependence on welfare or on others, through a process of lifelong adaptation to the changing cultural context.

The present book addresses all three sentiments. It aims to develop (1) individual, self-directed learning and growth; (2) social justice, equity and transformation through helping the poorest, most marginalized and most exploited communities to help themselves by addressing their own problems and learning how to learn; and thus (3) liberation from poverty and dependence on others, including foreign aid, through sustainable and transformational community development, and through a process of lifelong adaptation to the changing cultural context. Here we adopt Bagnall’s (2004) definition of ‘cultural context’ as follows:

The notion of a ‘cultural context’ is that of the values, beliefs and assumptions that constrain human perception, commitment and action. It embraces not just the epistemic, normative and metaphysical realities of the human condition, but also the consequential artefacts of those realities – the ways in which we relate to each other, the works of art that we produce and value, the social infrastructure that we develop, preserve or destroy, the ends to which we direct our energies, what we do with our time and other resources, and so on. The concern here is not so much with particular
values, beliefs or assumptions, as it is with their combined or cumulative nature. (p. 6)

The contemporary cultural context does not offer a singular or dominant notion of what is good, true or beautiful, nor does it offer a singular or dominant notion of how to recognize goodness, truth or beauty. Therefore, we agree with Bagnall’s (2004) conclusion: “From a sociological perspective, individual, collective and organizational realities are framed, as never before, by tensional ambiguity” (p. 7). He identifies 21 trends in educational policy and management that flow from this ideology and that are exemplified by his ‘fables’. As remedies, he recommends six principles for lifelong learning policy. These can be summarized as follows (pp. 162–164):

1. Contextualize educational reforms (tailoring education to participating cultures and to those who are affected by the reforms);
2. Minimize the prior specification of standards (and optimize specifications that are developmental and organic, rather than predetermined);
3. Enrich educational and training engagements (focusing on the intentions of lifelong learning ideology and advocacy to liberate, rather than on their technical features);
4. Cultivate the interpersonal (encouraging different interests and viewpoints that are relevant and seeking inclusive and pluralistic educational outcomes);
5. Promote the value of education (raising the public profile and understanding of education, with a commitment to honesty in labelling, marketing and advancing educational interests); and
6. Encourage critical reflexivity (of all persons involved in education – policymakers, managers, teachers, programmers, learners and others – to engage with all aspects of the educative process in a critically reflexive manner and to live ethically within the framework of ethical tensions in which they are inevitably immersed).

The present book shows how these six principles, among others, can be applied in community development through lifelong action learning. This learning is (1) contextual; (2) developmental and organic or natural (rather than standardized and predetermined); (3) practical and emancipatory (rather than technical); (4) interpersonal, collaborative, inclusive and pluralistic; (5) ethical – and ethically aware; and (6) critically reflexive.

The 1996 OECD Ministers meeting (OECD, 1997) confirmed that lifelong learning has become government policy and a feature of life for a privileged group in many countries around the globe, but that the challenge is to make it a reality for all. Our book takes up this challenge, helping to build the momentum for this new reality for all through integrating the concepts of ‘lifelong learning’ and ‘action learning’ as an enabling framework for sustainable community development worldwide, particularly in communities where learning opportunities through formal education are very limited.

There is some confusion in the literature around lifelong learning from writers who frequently use ‘lifelong education’ as a synonym for ‘lifelong learning’. As Wain (2001) points out, these writers aim “to recast schooling as a mere
constituent phase of education within the broader context of a learning society” (p. 183). Most who have written on lifelong learning do not distinguish between education, schooling and learning, but Trilling and Fadel (2009) do identify the salient lifelong learning skills needed in the twenty-first century, mainly for school teachers, educators, policymakers and people interested in maximizing classroom effectiveness, mainly in the US national context. They argue in the twenty-first century we need skills that are (a) different from those in the last century, and (b) in addition to the basic skills of reading, writing and arithmetic. These authors provide a new framework for twenty-first century skills in three categories:

1. **Learning and innovation** skills (critical thinking and problem-solving, communication and collaboration, creativity and innovation);
2. **Digital literacy** skills (information literacy, media literacy, information and communication technologies or ICT literacy); and
3. **Career and life** skills (flexibility and adaptability, initiative and self-direction, social and cross-cultural interaction, productivity and accountability, leadership and responsibility).

We agree that these three categories identify the main skills to be developed for and through lifelong learning in the twenty-first century. But we recognize that to develop these skills most effectively, our modes of thinking about education and learning need a paradigm shift. In this book we make a distinction between *education* – usually formalized, institutionalized, policy based, teacher centred and curriculum bound – and *learning*, which is learner centred, self-directed, life/work/community based and informal, but is also goal directed, intentional, strategic, systematic, reflective, collaborative and action oriented. Conceptually then, this learning can be defined as action learning. But before turning to the meaning of action learning, let us consider some of the shortfalls and challenges of lifelong learning.

Jackson (2011) and her associates warn of the position on lifelong learning currently dominant in policies around the world that ensures a gendered, class-based and skills-driven agenda expecting learners to become neoliberal subjects rather than empowered members of communities. They warn that lifelong learning has increasingly come to mean vocational education and training in a globalized knowledge economy, and argue for a sharp re-focus to align lifelong learning with social justice. Jackson (2011) maintains that: “Neoliberalism has led education to be understood as gaining technical knowledge, training learners in skills which enable them to adapt to economic globalization” (p. 6) with an interest in producing an efficient and productive workforce where “opportunities are created or denied according to class, gender, ethnicity, disability and age” (p. 3). She agrees with Freire (2004): “Then education becomes pure training, it becomes pure transfer of content, it is almost like the training of animals, it is a mere exercise in adaptation to the world” (p. 84). In this book we are concerned with learning through and for life rather than with education through formal institutional arrangements. We argue for the need to shift the dominant paradigm from training to development, from technical to creative thinking, from teaching as transfer of content to facilitating learning and problem-solving, in particular, to action
learning characterized by social justice, ethical behaviour, collaboration and sharing knowledge and experience with others.

ACTION LEARNING (AL)

Action learning is learning from and for action. Learning from action means we learn by doing and reflecting on what went well and what did not, how and why. Learning for action means we learn for future action by drawing from and adapting our learning from past experience to create best possible outcomes. So action learning is an iterative, cyclical process of action–reflection–learning, and continuing to the next cycle of action–reflection–learning is always new but always informed by learning from previous cycles. It is especially effective if pursued collaboratively, while working with others in groups or ‘sets’ on work-based problems. Action learning sets are important since they provide informal structures for set members to allocate time and space deliberately and intentionally for engaging in reflective learning through dialogue and discussion. I have defined action learning many times previously, for example (Zuber-Skerritt, 2011):

Action learning (AL) means learning from and with each other in small groups or ‘sets’ from action and concrete experience in the workplace or community situation. It involves critical reflection on this experience, as well as taking action as a result of this learning. It is a process by which groups of people address actual workplace issues or major real-life problems in complex situations and conditions. (p. 5)

Richard Teare explained in an interview (Zuber-Skerritt, 2009):

Action learning occurs when people learn from each other, create their own resources, identify their own problems and form their own solutions. This process works all the world over, in any culture, language and tradition. The action learning process is so enriching that every learner is able to identify personal and life transforming outcomes. These commonly include enhanced self-confidence, self-belief, renewal, enthusiasm for learning, a new sense of direction and purpose for career and life – along with new skills, insights and the sense of being equipped for the future. (p. 181)

While action learning is about dialogue and interaction between and among set members and others involved in the action, reflection on action plays a vital part in this learning process. Being a ‘reflective practitioner’ or a member of a ‘reflective practice’ means one engages in a continuous search for knowledge – both propositional and theoretical (knowing that …) and knowledge derived from practice (knowing-in-action or knowledge-in-use, i.e., tacit, spontaneous knowledge and thinking on one’s feet). Action learning as a reflective process is iterative and continuing – it has no end point. Schön (1983, 1987) distinguishes between ‘reflection-in-action’ (thinking while in the process of doing something) and ‘reflection-on-action’ (reflecting after the event on what one did). The latter
encourages reflective learning as well as critically reflective learning. Fletcher and Zuber-Skerritt (2008) distinguish between three levels of reflection:

1. Reflection on action learning activities, grounded in experience and observation and contextualized in both big picture and small picture understandings;
2. Reflection on what worked and what did not, and why, evaluating the action learning processes we used; and
3. Meta-reflection, i.e., reflection on the first and second levels, re-conceptualizing our previous interpretations and, with increased critical self-evaluation, arriving at new concepts, understandings and knowledge.

Of these levels, meta-reflection is the highest and deepest level of thinking. Like McGill and Brockbank (2004) we define meta-reflection in two processes:

Firstly, as a process by which experience is brought into consideration, and secondly, deriving from the first, the creation of meaning and conceptualization from experience and the capacity to look at things as potentially other than they appear, the latter part embodying the idea of critical reflection and potential paradigm shift. … In terms of reflection as part of reflective practice and, within this, reflective dialogue, the integration of mind and body (emotion/feeling and action) means that in the act of reflection we bring to that act our cognitive and affective experience. (p. 105)


Action research shares philosophical assumptions with action learning, but – like any other approach to research – the former is more rigorous, systematic and scrutinized than the latter and is always made public. In this book we focus on action learning more than action research because of the urgency in reaching (1) the people of great need whom this book seeks to reach indirectly, and (2) the people who help them to develop action learning ability through learning from this book directly. Both groups are more interested in learning than research. But as this book and its stories attest, we as authors are engaged in participatory action research. The integrated concepts of ALAR (action learning and action research) and PALAR (participatory action learning and action research) are grounded in the conceptual framework of both action learning and action research – concepts that I have discussed in detail in my recent books (Zuber-Skerritt, 2009, 2011, 2012). As practitioners and advocates of ALAR and more recently of PALAR, we have come
to recognize through reflection on our own lifelong experiences that the action paradigm is not simply an approach to learning and research. We see it as an approach to living our daily lives, from which we draw continuously throughout our lives. This is why we have become interested in identifying the similarities, differences and relationships between lifelong learning and action learning and inspired to synthesize the two into Lifelong Action Learning (LAL).

LIFELONG ACTION LEARNING (LAL)

Whilst what is usually recognized as lifelong learning (LL) is mainly individual, and by chance rather than by design, action learning (AL) is mainly collaborative and developed intentionally and in a systematic way. However, both LL and AL share the philosophical understanding that knowledge can be created not only by scientists in laboratories and by specialist researchers/academics in their research programs/projects, but also by ‘personal scientists’ (Kelly, 1955, 1963) and ‘reflective practitioners’ (Schön, 1983, 1987), that is, by anybody who learns how to create knowledge through experiential learning and solving real-life problems. The basic epistemological assumption is that people can create knowledge on the basis of concrete experience by reflecting on this experience, formulating abstract generalizations from it, and testing these newly created concepts in new situations, thus gaining new concrete experience, and starting the next cycle of experiential learning and knowledge creation (Kolb, 1984).

In this book, we develop a new concept integrating LL and AL into lifelong action learning (LAL). This concept includes on the one hand the time and space of LL from birth to death and in participants’ contemporary cultural contexts, and on the other the system and processes of action learning, as discussed in Chapter 2. Figure 1.1 visually depicts the overlap, integration and synthesis of LL and AL.

![Figure 1.1. Lifelong action learning: the synthesis of lifelong learning and action learning](image)

Table 1.1 presents a rough summary of the alternative learning paradigm we discuss in this book compared with learning in traditional education systems. Some schools and universities have incorporated characteristics of lifelong action
learning in their programs. But juxtaposing contrasting characteristics may help the reader to understand the different frameworks used in educational institutions today.

Table 1.1. Comparison between LAL and traditional education

<table>
<thead>
<tr>
<th>Lifelong Action Learning</th>
<th>Traditional Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner centred</td>
<td>Teacher centred</td>
</tr>
<tr>
<td>Process and project based</td>
<td>Content and curriculum based</td>
</tr>
<tr>
<td>Interdisciplinary, problem oriented</td>
<td>Disciplinary, departmentalized</td>
</tr>
<tr>
<td>Located in real-life/work</td>
<td>Located in classroom/laboratory</td>
</tr>
<tr>
<td>Inclusive, accessible to all, aimed at social justice</td>
<td>Exclusive, elitist, social justice not a conscious priority</td>
</tr>
<tr>
<td>Informal, self-directed learning</td>
<td>Formal education, policy based</td>
</tr>
<tr>
<td>Based on contemporary cultural context</td>
<td>Based on dominant western values and worldviews</td>
</tr>
<tr>
<td>Communities of learning, action learning sets</td>
<td>Individualized learning</td>
</tr>
<tr>
<td>Collaboration, cooperation</td>
<td>Competition (e.g., in assessment system)</td>
</tr>
</tbody>
</table>

We can now develop a model of LAL for unlocking human potential by using the six interrogatives: who, what, when, where, how and why.

*Who* plays the main role? Who has the main responsibility for learning outcomes? Who is in the centre of attention? – It is the learner, not the teacher, who identifies and decides what needs to be learned. There is no fixed or national curriculum. Each learner formulates his/her personal learning statement aided by a personal coach or mentor; and members of the learning set collaboratively define the focal problem they will address.

*What* is the content of learning? – It addresses a significant problem, issue or concern in the learner’s life or workplace, which needs to be understood and solved collaboratively with others in the set.

*When* does the learning take place? – Learners apply the principles of lifelong action learning as needed in daily life so learning is lifelong, active, continuous and recursive, irrespective of age, experience, and level of formal/institutionalized education the learner has completed.

*Where* can LAL be practised? – Wherever it is needed to enable people to address their difficulties to improve life in a sustainable way, whether in village communities in rural Kenya, or in disadvantaged communities in suburban Australia. It does not require established physical infrastructure such as learning centres, lecture halls or qualified teachers; participants continue to collaborate, reflect and learn wherever they are in physical space and time.

*How* does the learner learn? – Through developing an ability to understand and acquire or create knowledge continuously through experience, reflection on that experience, critical thinking, conceptualization and innovative action, in other words through lifelong action learning – not by being told what to do and how to do it.
Why is this kind of learning important in the twenty-first century? – Because regardless of time and place it is effective in addressing the needs of people involved and the communities in which they live. It leads to continuing improvement of life circumstances; sustainable community development; personal growth, empowerment and confidence; and importantly, then, to the learners’ quality of life: physically, mentally, psychologically and spiritually. It serves us as holistic human beings who are global citizens.

Figure 1.2 illustrates these six characteristics of lifelong action learning and its utility for unlocking human potential and for sustainable community development. Both outcomes have a particular imperative in this time of accelerated change, turbulence and natural disasters across the globe, when we need to think differently and collaboratively, with more creativity and innovation and regard for our common good than ever before.

![Figure 1.2. A model of lifelong action learning for unlocking human potential](image)

After finishing my first draft of this chapter I had the opportunity to meet Marilyn Taylor at the Royal Roads University in Canada, author of the book *Emergent Learning for Wisdom* (2011). We had never met before and were amazed at the similarities in our thinking and writing, developed independently at opposite sides of the world. Although we have been influenced by many of the same theorists, such as Dewey (1938), Kelly (1963), Freire (1972), Argyris and Schön (1974), Schön (1983) and Kolb (1984), we have contributed to different literatures and used slightly different terminologies. For example, what I call 'Lifelong Action
Learning’ includes Taylor’s ‘Emergent Learning’, for both wisdom and a better world. Although Marilyn contributes mainly to the literature on ‘Leadership Development,’ her concept of emergent learning is also relevant and applicable to ‘Transformational Community Learning and Development’. Both fields need new ideas about the process of creating a shift in ways of thinking, a transformational consciousness, and a new perspective/approach to action in this twenty-first century world. As Taylor (2011) defines:

Emergent learning arises from our direct experience of the practical world; it is triggered by an unpredicted event. The process that follows has the possibility to create not only knowledge but also wisdom we need to engage productively and effectively in a world of uncertainty. Learning that leads to wisdom involves the whole person and new dimensions that have been banished from public life in the modern era. It requires attention to our right-brain processes – sensing, feeling, imagination, metaphor, and context – as well as left-brain processes – analysis, logic, strategy, and application. (p. 3)

In other words, wisdom gained through emergent learning provides both experiential richness and logical cohesion, as well as conscious and unconscious processes. Taylor (2011) argues that:

*Emergent* learning means more than acquiring knowledge over a lifetime; it means that we *create* new knowledge continuously as we encounter new conditions and challenges. This implies two other qualities of the new learning. Learning emerges in relation to a specific context; so what we come to know is *embedded*, and its meaning and value are linked to a particular time and place. (pp. 31–32, original emphasis)

In this sense, Lifelong Action Learning (LAL) is also emergent, creating new knowledge continuously, and embedded in a particular context. In addition, LAL is developed collaboratively with others in groups, communities or organizations, in an intentional and systematic way, and is then cascaded to others. While our story in this book applies LAL to community development, we recognize that Taylor’s generic model of emergent learning can also be applied usefully to community development, beyond its original application to leadership development. This is because of its utility for learning through experiences that challenge us with double- and triple-loop learning, as I discuss later in this chapter.

This book focuses on LAL for adults and youth in organizations and communities outside the formal education system. We recognize that the concept can be adopted or adapted for learning in schools and higher education institutions, but this is not our focus here. Rather, we introduce the LAL concept and applications of it in poor and disadvantaged communities, mainly in rural settings in developing countries. Our goal is to prepare leaders and members for community development that is enabling, transformational and empowering across the community, and sustainable by the community itself.
CHAPTER 1

TRANSFORMATIONAL AND SUSTAINABLE COMMUNITY DEVELOPMENT

Let us begin with ‘community development’, a term that – like lifelong learning and action learning – is somewhat rubbery and needs to be clarified here. Community development generally refers to a process and an outcome – bringing people together to achieve a common goal for improving the quality of life of community members. Our use of the term in this book is more specific; as Alison Gilchrist (2009) observes:

Community development is primarily concerned with meeting the needs and aspirations of community members whose circumstances have left them poorly provided for, often without adequate services, with limited means to organize, and excluded from mainstream opportunities to participate in activities or decision making. Community development seeks to build collective capacity by improving skills, confidence and knowledge for individuals and the community as a whole. (p. 36)

In this spirit, the International Centre for Community Development in the United Kingdom recognizes that the process of community development is to bring about change founded on social justice, equality and inclusion, enabling people to organize and work together to identify their own needs and aspirations, and to take action to influence the decisions that affect their lives. In this way the people involved improve the quality of their own lives, the communities in which they live, and the societies of which they are part (http://www.londonmet.ac.uk/faculties/faculty-of-social-sciences-and-humanities/research/international-centre-for-community-development/– accessed 27 July 2013).

In this book we are concerned with community development as a process. While we acknowledge that there are many paths to effecting the community development process, we explain lifelong action learning as a particularly effective and lasting approach to pursuing this process. We recognize that many people of great need are currently denied the opportunity for community development on the understanding that this is a process delivered from outside and above them. Our view of community development is the opposite, as the two views offered above convey. We recognize the capacity for community development within society among and by people at society’s grassroots, to achieve positive, empowering and sustainable outcomes and therefore ongoing community development. A useful website with key terms and definitions of community development, community engagement, community change, partnerships, capacity building, competence, empowerment, action, etc., is the following: http://tamarackcommunity.ca/g3s118.html (accessed 27 July 2013).

What of sustainability? Of the many definitions of sustainable development, one that appears to be most frequently quoted is from the so-called Brundtland Commission Report produced by the United Nations World Commission on Environment and Development (WCED, 1987): “Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs”
The Report calls for greater international cooperation to improve global environmental, economic and social sustainability, and it stresses that environmental problems are closely tied to problems of economic and social inequality.

In this turbulent twenty-first century world, ‘sustainability’ is in common conversation, while the earth’s burgeoning human population draws ever more heavily from a finite planet; and what many informed observers recognize as human-induced global warming raises question marks over the earth’s capacity to sustain human wellbeing far into the future. Sustainability is therefore now widely recognized as an important concern for the continued wellbeing of ourselves and of future generations. Achieving outcomes is one thing, but sustainability, i.e., the capacity to maintain the outcomes without compromising the ability of future generations to meet their needs, is another.

As authors of this book, we conceive sustainable development as the facilitation of LAL so that individuals, groups and whole communities may develop the understandings that enable them to analyze and improve their real-life situations. We aim for learners to take charge of their own lives and work, discussing and reflecting with others on what has or has not worked, why and why not and how, and what needs to be done next, how and to what end.

As a result of this approach to problem-solving through trial and error, discussion, reflection and learning, learners will become able to apply their learning from one task to other tasks. This means ‘double-loop learning’ or transformational learning for life; not just for earning a living, but for living. Single-loop learning means, in brief, that the learner has changed action strategies, but has not identified or digested the principles of the process for application elsewhere, whereas double-loop learning involves changes in goals, assumptions, values and/or standards for performance through mindful appreciation of the change process. As Argyris and Schön (1974) put it:

In single-loop learning, we learn to maintain the field of constancy by learning to design actions that satisfy existing governing variables. In double-loop learning, we learn to change the field of constancy itself. … Double-loop learning changes the governing variables of one’s programs and causes ripples of change to fan out over one’s whole system of theories-in-use. (p. 19)

‘Theory-in-use’ relates to our behaviour – what we actually do – as compared to ‘espoused theory’ that relates to our belief system – what we believe and say we do (but mostly don’t). Single-loop learning takes a mechanical, technical or surface approach to learning whereas double-loop learning takes a deeper and transformational approach that enables positive change. In the context of twenty-first century accelerated or exponential change, learning must be more than technical and superficial; it needs to be transformational by registering at a deeper level. Yet there is an even deeper, third level of learning that we call ‘triple-loop learning’. Bateson (2000) called it ‘third-order learning’ (Learning III) and Torbert (1972) spoke of a ‘third level’ of consciousness and learning through triple-loop
feedback generating a transformation in one’s awareness of self and life purpose (‘autobiographical awareness’). How do these three levels or loops work when it comes to learning for community development?

Through single-loop learning we would use our existing knowledge and strategies and impose them on the communities we want to help. Community members would do what they are told, how they are told, without learning how to learn reflectively and critically, to create knowledge for addressing future challenges. Through double-loop learning we would try to find out what the community needs, using cross-cultural communication, dialogue and feedback, and we would then know what we didn’t know before. Through triple-loop learning, however, we examine our “taken for granted purposes, principles or paradigm” – how we see and identify ourselves … who we are (Torbert & Fisher, 1992, p. 195) – and learn from and with members of the community as equal human beings, co-learners and collaborative action researchers. This level of learning, research and development is not given, determined or predetermined, but emergent (Taylor, 2011), transformational and sustainable.

Transformational, sustainable community learning and development through LAL explicitly rejects passive reliance and dependence on foreign aid and outside experts. It entails active, self-directed and collaborative problem-solving and learning by the people themselves together – within their community and without expensive resources. Some outside help and resources may be needed at the outset in extreme situations of poverty or natural disasters. Yet it is important for both human dignity and a satisfying existence that people in need do not become aid-dependent, relying on handouts for life, but learn to be creatively self-sustaining. Indeed, this capacity to gain independence and to live as a self-sustainable community is at the core of the transformation we refer to here. This principle of transformational and sustainable learning and development was recognized and practised even in ancient times, as Chinese philosopher Lao-Tzu (sixth century BC) expressed in his well-known aphorism: Give a man a fish and you feed him for a day. Teach him how to fish and you feed him for a lifetime.

Generally, the many books concerning community development use a methodology where ‘development’ is designed and directed from outside, and therefore implemented ‘upon’ the community. But the methodology in this book is for ‘community improvement and development’ – designed, directed and implemented from inside the community, by and for the community itself. Through this methodology, knowledge emerges to best suit what the community’s people identify as their needs and abilities to satisfy these needs in a sustainable way, for lasting community wellbeing and a better world at large.

The principle of assets-based community development (Kretzmann & McKnight, 1993) has been promoted as a process for identifying assets (skills, resources), strengths and issues in communities, social groups or informal networks; then building on these strengths and helping to enable members to solve the issues themselves. Assets-based community development builds capacity and empowers, rather than providing people in poor, disadvantaged communities with aid, money and other handouts.
Other important principles of transformational and sustainable development through LAL are collaboration, networking, vision and team building, mutual respect and trust, critical reflection, communication, coordination, cooperation and openness to change. Facilitators of a community development program must be collaborative action leaders who can facilitate the processes of vision and team building, identify issues, strengths and weaknesses through analysis of SWOT (strengths, weaknesses, opportunities, threats), of stakeholders and resources. They also need to know how to facilitate strategic action planning, project management, evaluation and reflection on results. We can all become community facilitators and team leaders who develop other leaders around us, working in teams to achieve a shared vision. Teamwork is at the heart of great achievement. That is why President Lyndon Johnson said: “There are no problems we cannot solve together, and very few that we can solve by ourselves”. Maxwell (2007, p. 47) offers the quote: “If you want to reach your potential or strive for the seemingly impossible, you need to become a team player.” Another quote in the same book is by St Francis of Assisi: “Start doing what is necessary; then do what is possible; and suddenly you are doing the impossible.” This is true for everyone, but especially when you work in a team and cascade your learning to others with a multiplying effect.

Chapter 2 will demonstrate how the above processes can be introduced, developed and cascaded throughout a community and to other communities. In the next section I introduce the structure and content of the book as ‘advance organizers’ for readers’ convenience.

STRUCTURE AND CONTENT OF THE BOOK

This book consists of three main parts. Part I by Ortrun Zuber-Skerritt introduces the conceptual framework (Chapter 1) and practical guide for unlocking human potential through LAL (Chapter 2). Part II by Richard Teare presents approaches to and case studies on unlocking human potential in the poorest and most remote communities in about 40 developing countries. Part III by both authors presents reflections and conclusions: Reflections and insights on the GULL system through video technology (Chapter 6 by both authors) and reflections and conclusions on learning for transformational development to help create a better world (Chapter 7 by Ortrun Zuber-Skerritt). Each chapter presents a chapter ‘outline’ at the beginning, and at the end ‘topics for discussion’ and a list of ‘further readings’. Included are references to accompanying materials, such as online materials and web/video links, mainly from Richard Teare’s GULL website (gullonline.org), but also links from other websites.

The layout of this book is illustrated in Figure 1.3.
This introductory chapter has argued that we need a new conceptual framework of learning and development in the twenty-first century. The next chapter presents practical guidelines for developing this framework of lifelong action learning that encourages the critical, creative and innovative thinking inherent in human beings from childhood, but often systematically discouraged at school where children are taught to conform and comply with the curriculum, with the pace of learning in large classes, and with teachers’ instructions from primary through high school and sometimes still even in university. In this book, we show how to rekindle the flames of learning in a natural, human, work/life based way.
Our goal is not to reform the formal education system, but to present an alternative lifelong action learning (LAL) system for those who have no opportunity to access school education or higher education because they live in poor and/or remote or otherwise disadvantaged communities. Certainly, educators in formal education may also learn from our alternative learning system. This LAL system has not only proven to be highly effective for learners in the poorest and most disadvantaged communities, but – based on my experience and the recent literature on transformational learning and sustainable development – fulfils the requirements of knowledge and skills required for wisdom in a better world in the twenty-first century (Bellanca & Brandt, 2010; Longworth, 2003; Taylor, 2011). Transformational development through LAL means learning and development from an ‘inside-out’ perspective so that it is sustainable over time. LAL can be continuously adapted to learner needs as appropriate for time and place. It is not an end in itself or a product, but rather is a process of emergent learning at the double- and triple-loop levels. Through LAL we continuously create knowledge and wisdom as we encounter the complex, unpredicted problems and challenges in this turbulent twenty-first century world characterized by exponential change.

TOPICS FOR DISCUSSION

1. What were the benefits and challenges for you reading this chapter?
2. What concepts would you like to use in your work: lifelong learning, action learning, emergent learning and/or lifelong action learning? And what is your definition of the term(s) you will be using?
3. Can you envisage conducting a community or organization development program? Who would be the participants you would work with? What would be your shared thematic concern/issue/problem? What would be your common goal and expected outcomes?
4. How would you define ‘wisdom for a better world’ in the twenty-first century? Give an example.
5. Can you draw your own model of your conceptual framework for learning and development in the twenty-first century? Please, try!

FURTHER READINGS

CHAPTER 1


   Papers on action research and action learning and related topics associated with “AREOL” (Action Research and Evaluation Online) – a free on-line course available on the web and/or by email (bd@bigpond.net.au or bobdick@me.com) or Skype (bobd35).

REFERENCES


Kretzmann, J., & McKnight, J. L. (1993). Building communities from the inside out: A path toward finding and mobilizing a community’s assets. Evanston, IL: Institute for Policy Research, Northwestern University.


CHAPTER 1


CHAPTER 2

HOW TO DEVELOP LIFELONG ACTION LEARNING

Ortrun Zuber-Skerritt

Inside every person is a unique brilliance.
Unlocking this brilliance opens a world of possibilities.
(http://www.smartwired.org)

OUTLINE

Chapter 2 explains step by step how to develop lifelong action learning (LAL) in a systematic, collaborative, creative, sustainable and enjoyable manner, as a system that the authors have used successfully in various settings. It helps readers to understand and learn how to design, conduct and continuously evaluate an action learning program or project, by including guidelines, processes and exercises that individuals can use for action and reflection and then share in small groups or ‘action learning sets’, supported by materials on the GULL website (www.gullonline.org). Readers become active participants in this process and system of learning and development.

Among other things, readers learn how to:
– start an action learning project and pathway (relationship building, needs analysis, defining the thematic concern, etc.);
– design and implement the first stage or cycle in a collaborative action learning project;
– formulate a ‘Personal Learning Statement’ (PLS);
– reflect on major learning events using the daily, weekly and monthly diary format (DF);
– identify their ‘Return on Learning Outputs’ (RO) at the individual, group, organizational or community levels, and provide evidence for this transformational learning, change or development;
– prepare an oral presentation and a written report on this journey of lifelong action learning (LAL); and
– proceed to the next cycle in the spiral of further LAL cycles.

INTRODUCTION

This chapter is about developing lifelong action learning (LAL) as a systematic and collaborative approach to organization and community development generally. It is
CHAPTER 2

based on my personal experience of using educational principles and processes that have proven to be most successful with groups in a variety of contexts, such as academic staff development, postgraduate education, and leadership development across the education spectrum, in business management and government. This discussion includes processes, methods and techniques that my co-author Richard Teare has designed for his action learning system in GULL (Global University for Lifelong Learning), which he discusses in the following chapters.

Many outside the world of entrenched poverty have generally understood community development as foreign aid to ‘the poor’ – providing essentials such as food and medical support to sustain or improve human life. Aid programs for education usually provide a type of education familiar to the aid providers, designed for western cultures in formal classroom settings, which is alien and unsuccessful for effective learning in subsistent communities. In a Technology, Education, Design (TED) conversation, Aissatu Sila (2013) summed up the foreign aid dilemma in response to the question: Can donor funding really fix African challenges, or should we empower African communities to address their own challenges?

I deeply appreciate individual donations to global causes, but isn’t it convenient to the western governments to keep funding our dependence and underdevelopment, so they can keep exploiting our resources?

How do we get communities to transform the future? By educating them and providing a stable economy in which they can prosper. As Deekay Mgbekemdi said and I agree – it’s a leadership issue. Once we have the right leaders, we’ll follow the right path.

The key issues here are dependence, underdevelopment and exploitation of people in need, and as remedies to these circumstances, transformational education and leadership for these people. Since publication of the subversive book by Illich (1971) on Deschooling Society, laudable attempts by activists have tried to change education from ‘schooling’ to what we identify as lifelong action learning and community development, using outsiders’ funding to promote sustainable community development by self-directed learners and leaders within a community. Examples of such activists are Freire (1972) and Fals Borda (1991, 1998) in Latin America, Revans (1982) in the UK, Lewin (1926, 1948) in the USA, and more recently Rahman (2008) in Bangladesh, Stringer (2008) in East Timor and (2012) in Australia, Castillo-Burguete et al. (2008) in Mexico, Swantz (2008) in Tanzania, and Nyoni (1991 and ongoing) in Zimbabwe. Despite these examples, little has changed in the approaches by NGOs and western governments to supporting education for aid recipients in the developing world. To address this problem we need a new generation of people who are willing and able to help communities solve their own problems and produce action leaders who cascade their own learning to others in the community. Identifying how this can be achieved is the challenge and significance of this book.
As explained in Chapter 1, this book is about developing lifelong action learning as an alternative system of learning and community development, particularly for communities lacking resources and opportunity. The purpose of this chapter is to demonstrate how to help people in such communities to define their own learning needs and goals; identify their particular strengths, gifts and ‘unique brilliance’; develop these talents; sustain their self-directed LAL, and develop action leadership to help others within the community on their own learning journey.

This chapter explains how to experience, understand and put into practice the main principles of lifelong action learning (LAL) introduced in Chapter 1. Participants form a learning set to conduct individual or group LAL projects, and are aided by a facilitator, coach and each other along their LAL journey. Here is a brief summary of the main principles of LAL – and how participants in LAL projects or programs can implement these principles through relevant actions/tasks explained in more detail later in this chapter.

1. Reflection – daily, weekly and monthly, recorded in a diary format (DF);
2. Communication and collaboration – relationship building, vision and team building, and the role of a personal learning coach;
3. Self-directed, autonomous learning – supported by preparing one’s personal learning statement (PLS), and statement of return on outputs (RO);
4. Problem solving: identifying problem and action – needs analysis for (1) defining the theme of a team project to address a significant concern shared by all team members and stakeholders, and where appropriate (2) conducting a LAL program comprising several team projects in accordance with participants’ shared and individual needs; and
5. Presenting and celebrating results achieved – preparing for a public presentation that demonstrates personal learning, reflective evaluation and collective outcomes and celebrates these achievements.

These five principles are used as headings in the following discussion. Under these headings the relevant tasks and processes are explained to enable readers to understand and develop lifelong action learning and problem-solving skills in their role as facilitator, coach or set member. We call this professional development. Some activities can be carried out individually and then discussed with a personal learning coach and/or others. But for other activities a facilitator may be required to help participants maximize personal learning and return on learning outputs, e.g., the ‘turning points’ exercise, vision and team building, needs analysis using the nominal group technique, conducting a LAL program with team projects, and organizing the ‘Presentation and Celebration Day’. All these activities are discussed in more detail later in this chapter. The next section is about reflection and learning how to reflect in a regular and systematic way.

**Reflection**

Reflection involves thinking analytically about what has happened or what we have done and learned from the action and recording our reflections in a diary format on a daily, weekly and monthly basis. Reflection is the most important aspect of LAL.
It can be mastered through experience, developing reflective skills gradually and consciously. We need to set aside some reflection time each day (anything from five to 30 minutes) at a time that suits us best, e.g., first thing in the morning or last thing at night. In the following, I present a simple explanation and diagram of a reflection diary, followed by guidelines on the daily, weekly and monthly format.

**Keeping a Reflection Diary**

Here I offer a brief explanation of what is involved in keeping a reflection diary:

- Identifying the most significant events of the day for you personally and recording these in your diary;
- Reflecting on these events, trying to make sense of them and how they are interrelated, and writing down what you have learnt from them; and
- Identifying what action(s) you intend to take as a consequence of this learning.

**Reflection Diary**

![Diagram of a systematic reflection diary process](image)

Figure 2.1 is a diagram that I designed for participants in LAL programs. It has been published several times previously. The diagram illustrates the process of recording significant events daily, reflecting on these events and personal learning, and planning for subsequent action as a result of this process. The advantage of strategic action planning is that you may take the planned action and tick it off, or delete it if it becomes obsolete because of changed circumstances. The daily entries are followed by a weekly review. This review of recorded events, learning outcomes and action plans is to trash and relocate unimportant data into a separate
folder (to be kept in case these data need to be retrieved later); to check actions
done, to be done, or no longer necessary; and to reduce data to the essentials. Once
a month the data from the weekly reviews are reviewed again to further reduce the
accumulation to only the most essential data, making data analysis more
manageable.

Keeping a reflection diary in such a systematic manner offers us the advantage of
learning from experience (Kolb, 1984), becoming more effective and reflective
practitioners (Schön, 1983), and being able to both develop learning principles and
personal theories or constructs (Kelly, 1955, 1963) and take appropriate action.
The diagram in Figure 2.1 models a systematic diary reflection process. Reflection
diaries or logbooks or research journals are valuable heuristic tools for reflection as
well as for formulating the essence of this reflection in written form.

GULL has designed simple forms for daily, weekly and monthly diary format
(see Appendices 2.1–2.3).

**Diary Format**

The ‘Daily Summary’ form (DF) asks for:
- Today’s activity list
- What went well and why?
- What didn’t go well and why?
- What could I have done differently and how?

The diary-form reflection cycle requires the learner to prepare a written reflection
every day, with a summary at the end of the week and at the end of the month. The
weekly summary includes the weekly activity list and responses to the above
questions. It also includes a list of discussion points that the learner prepares to
discuss with their personal learning coach, and of discussion outcomes after
discussion with the coach. The monthly summary also addresses a further question:
‘What have I learnt this month and what do I need to learn next month?’ Learners
must discuss their monthly report (of about 750 words) with their learning coach,
who adds his/her written comments on the report with signature and date. The
internal assessor also adds his/her comments with signature and date. The daily,
weekly and monthly forms can be downloaded for free from the GULL website
(www.gullonline.org). For those without Internet access, the forms are included at
the end of this chapter as Appendices 2.1–2.3. The next important aspect of LAL is
the principle of communication and collaboration.

**COMMUNICATION AND COLLABORATION**

Much has been written about the need for effective communication within
organizations and communities and for collaboration locally, nationally and
internationally. I think the best approach to effective communication is expressed
in the axiom: think globally, act locally. We can best communicate at the local
level in small groups or teams by developing a spirit and culture of trust, sharing,
networking and collaboration, while keeping an eye to the global context that is the
ultimate site of our shared interest as citizens of this planet. This way we can achieve best outcomes at the local level and are better able to become negotiators, activists and peacemakers at other levels, including in other countries, if we wish to take that path as a useful contribution to our global community. But how can we take these vital steps towards effective communication? It is easier said than done. Here I offer some guidelines on how to start building a firm underlay for effective communication through relationship building, vision and team building, and coaching.

**Relationship Building**

Relationship building is essential for a successful action learning program or action research project, both of which depend on trusting and mutually supportive relationships among team members. Without relationship building, team members are likely to experience all sorts of problems that can arise from competition, envy, shyness, denial, dominance by some and silence by others, and other personal qualities that can fuel tensions. Achieving positive team results takes much longer if people do not trust one another from the beginning of the project. Many relationship building exercises can be used. I have found the snake (or river) technique in combination with Bob Dick’s guide on relationship building most effective and time efficient.

*The snake technique* is one of many tools to help us to reflect. I first learnt it from my friend Maureen Pope in the UK (see, e.g., Pope & Denicolo, 1991) and have since used it with many action learners individually and in groups, to raise their consciousness of their own and others’ learning. This technique involves you drawing, in private, a representation of your private or professional life in the form of a winding snake (or river), with each turn representing a personal event/experience that influenced the direction your life/career took. Annotate these turns briefly and then discuss and elaborate them with your coach or in a group to elicit the significance of these formative experiences for both your career decisions and personal style as practitioner. Figure 2.2 is an example of a snake produced by a student; yours, of course, will signal the distinctive landmarks in your own life. This diagram is not copyright.1

I recommend you go through the following process that takes about 10–15 minutes. It is ideal for a new team on the first or second meeting, for it helps to build mutual as well as self-understanding, and a supportive network among team members.
Figure 2.2. A student’s snake diagram

Began nursing – enjoyed training. Average achiever that’s me!
Qualified – decided I wanted to be a Sister. At that time Midwifery considered vital for this promotion. Therefore, went on to do training.

Felt I was getting old!! It was time to do something different – went to Australia for a year. Was approached to become a clinical tutor.

Back in England – got a job back in Midwifery – 1st year stimulating.

Felt my grey cells atrophy – saw local Tech. syllabus – signed up to do FETC. Grey cells revitalized.

Finishing FETC – realized I wanted to do more – applied to do ADM at Bristol.

Had finished ADM – felt unsettled – missed studying(!!) somewhat to my surprise, decided I wanted to teach. Advised to get an unqualified tutor’s job.

Unqualified tutor’s job great – applied for PGCEA – GOT ACCEPTED! Wait for next kink in the tail!!
CHAPTER 2

Step 1: Draw a snake (or river) with about six turns and write down at each turning point what it was in your professional or private life (positive or negative) that was most significant in turning your life in a different direction.

Step 2: Reflect on why these were turning points in your life and what you learnt from them. These two steps are especially useful in relationship building with your coach for your action learning project, and with the members of your action learning set. In both situations you can proceed with the following two steps.

Step 3: Share your ‘snake’ insights with your coach. In a meeting with your coach and/or members of your action learning set who have also drawn their snake diagrams as life maps, ask each other questions about the reasons for isolating a particular incident to encourage reflection on its effect on your/their practice and professional identity.

Step 4: Reflect on, and write down, the learning and insights from this exercise and submit your reflection piece to your coach for further discussion and feedback.

In my experience the value of this exercise is its capacity to increase participants’ awareness of their untapped potential that they could develop and the self empowerment they achieve by coming to terms with their self, reflecting on their personal theories in terms of their own lives and opportunities, and being able to do the same for others. This process fosters their development as lifelong reflective practitioners who help each other in this process. A similar process I have used and found to be effective for relationship building with several groups (academics, postgraduates, managers, executives and community agents) is the exercise developed by Bob Dick (2012) called “Turning Points”.

The Turning points exercise is an activity for building relationships in small groups. It can be facilitated by a group leader whose task is to allocate time to each phase, to ask the questions to the group and to facilitate/monitor the whole process. You may print out the handout from http://www.aral.com.au/pdfs/04turningpoints.pdf (accessed 28 July 2013) or copy/print it from Appendix 2.4 in this chapter.2

In my experience, this exercise always works. When asked for feedback, participants are often surprised about themselves, saying, for example:

– I never thought I could talk about my personal experiences to a stranger whom I’ve never met.
– I was astonished how openly we all talked about our most private feelings and thoughts.
– At first I felt uncomfortable about disclosing and sharing my turning points with others, but I soon trusted them because they trusted me.
– I came to know the people in my group pretty fast and could respect them for what they are.
What are your reflections after this exercise? What comments by others in your group did you find most revealing?

Trust, respect and openness to new ideas (i.e., your own ideas and those of others) are prerequisites for good relationships and team spirit within a group, organization or community.

**Vision and Team Building**

Many methods can be used to encourage and facilitate vision and team building. In action learning projects, I have found the following process most effective, time efficient and able to nurture participants’ creativity. I encourage you to try it out with an action learning group (steps 1–2 and 4–5) or in a larger program with several action learning teams (steps 1–5).

**Step 1**: Participants individually draw a picture of how they see the results of the team project at the end of its term (e.g., in one, two or three years’ time), using different shapes, figures, colours, etc. Usually at the start, most participants are reluctant to do so. I remember myself having said initially, ‘I can’t draw/paint’. But we need to overcome this resistance by recognizing and abandoning it, using our imagination, creativity and dreams (the right side of our brains) expressed in non-verbal language and pictures, rather than our rational, intellectual thinking expressed in verbal language and statements (the left side of our brains).

**Step 2**: Participants work in their teams, each first explaining to their group the individual vision they have drawn. They then draw their team vision, with each member contributing something to the picture and commenting on the meaning.

**Step 3**: A representative of each team presents their project team vision and explains it to the whole group, because while most pictures become clear to the teams themselves, they usually have no meaning whatsoever to others. Each team vision is then questioned and discussed by the whole group.

**Step 4**: Each team may keep its vision picture on the wall in a certain place, ideally a room where they meet most often. Whenever in difficulty, a team might revisit or revise its vision. Team members might revise this vision regularly, because it will evolve and might change over time. This team/project vision is powerful, motivating and serves to sustain energy throughout the project; and team members as action learners build an effective, winning team.

**Step 5**: Team building based on needs analysis and vision can be strengthened by a SWOT analysis (strengths, weaknesses, opportunities and threats) of both the project and the team. For a step-by-step guide, I recommend the Workbook by Passfield and Carroll (2013), which is also useful for planning the team project. In the GULL/LAL system, every learner selects his/her personal coach and both learner and coach need to understand what is involved in the coaching relationship.
CHAPTER 2

Personal Learning Coach

In GULL every learner is asked to find a personal learning coach, i.e., someone whom they respect, trust and can learn from. Coaching is a one-to-one relationship in which the learners are helped in their lifelong action learning by the coach’s experience, questions and guidance. The coach’s approach is Socratic, i.e., like that of Socrates – the ancient Greek philosopher (469–399 BC). A coach engages in dialogue with the learners by asking questions rather than giving advice, or as Revans (1982, p. 16) expressed it, by ‘questioning insight’.

The coach’s role is to help learners become more effective reflective practitioners by building a positive learning environment, using open-ended questions to probe and analyse needs, listening actively, and providing ongoing, informal support to help learners achieve their aims and work out their own solutions. Therefore a coach needs to know about different learning styles and to practise action learning principles.

Learning styles differ from individual to individual. There is no one best or perfect style, so coaches need to be aware of the main styles that may best suit an individual team member. For example, we distinguish between learning styles that are mainly auditory (learning through listening), visual (through seeing) and kinaesthetic (mainly through doing, showing, moving, developing, i.e., physical action). Honey and Mumford (1986) adapted Kolb’s (1984) inventory of learning styles by using a simpler language: ‘activist’, ‘theorist’, pragmatist’ and ‘reflector’. Activists learn best by doing first and thinking later, willing to take risks and make mistakes. Theorists prefer to first think things through logically, analytically and methodically. Pragmatists generally theorize a little and then prefer to try things out. They tend to act quickly and confidently. Reflectors do not like to work under pressure, and prefer to work at their own pace, observing and listening to others, and reflecting deeply.

Coaches need to appreciate and cater for all learning styles by questioning each learner about their preferred approach. Visual and kinaesthetic learners (or a combination) and activists, pragmatists or reflectors (or a combination) are in my experience more naturally oriented towards lifelong action learning principles. However auditory learners (preferring to listen to lectures/presentations) or theorists – the traditional academic type – can adopt this approach through the guidance of a coach or by working in a supportive, reflective community of practice.

Action learning principles include the principles of lifelong learning, capacity building and continual improvement of professional practice, mutual respect, and commitment to establishing and pursuing goals, and working together to achieve them. In this book, coaching is conceived as coaching for leadership (Robertson, 2008) through coaching of partnerships. This means that (at least) two partners help each other to improve their professional practice and leadership so it becomes an ongoing and sustainable professional development activity (Hargreaves & Fink, 2006) and develops action leadership as discussed in Chapter 1 (Zuber-Skerritt,
Establishing a working relationship: Tell each other frankly and openly: what you expect of each other in your partnering relationship; how you envisage working together; when, where and how often you will meet; etc. At the end of this discussion, write down the important points that will serve as ground rules and a kind of initial contract.

Creating a supportive learning environment: For the coach, tell the learner that (1) although you might be older and more experienced, you are not expected to be an expert in any particular area. Rather, you want to help the learner by asking questions, especially open questions that cannot be answered by ‘yes’ or ‘no’; and (2) you want to learn as well. You might each talk about your strengths and weaknesses and how you might build on the former and avoid or positively address the latter. This discussion is likely to create a more comfortable and informal learning climate where the learner can be at ease and trusting.

Being effective and professional: For the learner, make a commitment to becoming effective and professional in your work, prioritizing your activities, turning up at meetings on time, and submitting your assignments to your coach when promised/agreed. Do not let anyone down (e.g., coach and learning set)! Appreciate that they may have many other demands upon their time. So be considerate, respectful and do not waste their precious time! Then they will respect you and walk the extra mile to help you. People whose lives move to a different drum, at a different pace, may find this hard to understand and follow if it is in their culture to put the extended family first, or ‘to take time out’ when they feel like it. This book, Chapters 4 and 5 in particular, demonstrate that these cultural habits can be overcome or adjusted in order to achieve positive results for the whole community in need.

Learning the questioning (Socratic) approach to coaching: Apart from rationally understanding the guidelines on the coaching relationship above, it is important for coaches actually to experience and practise the principles of active listening and asking open questions. For this purpose, I designed the following activity that I call the ‘Socratic approach’. I have used it frequently, e.g., with groups of postgraduates and their supervisors for defining the focal question of a thesis.

Socratic approach activity: Form a group of three or four members (one being the time keeper) and agree that each will be in the ‘hot’ seat for 10 or 15 minutes, while the other ‘critical friends’ ask questions (like coaches). There is one important ground rule: No-one is allowed to talk in sentences (except the candidate in the hot seat) and to give advice, but only to ask questions. This Socratic approach is not easy for the critical friends or for the candidate in the hot seat who is thus forced – and helped – to come up with the answers and to make his/her tacit, implicit knowledge more explicit. For example, the following five essential questions can be asked about designing and learning from an action learning project:
CHAPTER 2

1. What do you want to focus on? What is your central question, issue or concern? – Focus.
2. Why is this important and who will it benefit? – Significance.
3. Why is this new or different from anything done before? – Original value and contribution to knowledge.
4. How will you solve your focal problem? How will you argue, demonstrate and provide evidence that you have solved the problem and achieved your goal? – Method.
5. When will you start and finish your project? What are the milestones in your timetable? – Timeline.

A prerequisite for effective teamwork is that each member is a self-directed, autonomous learner.

SELF-DIRECTED, AUTONOMOUS LEARNING

The goal of the Global University for Lifelong Learning (GULL) is to develop self-directed lifelong learning through action learning. As mentioned in Chapter 1, its mission is to enable participants “to make a difference in OUR world. GULL’s practical approach to personal and professional development uses action learning to help individuals, communities and organizations to sustain learning and apply the outcomes”.

As GULL operates in a decentralized network style structure with local leadership, the central operating costs are kept as low as possible. This means that the central team is not resourced to work with or support individuals or provide web-based courses. Instead, GULL works directly with and through affiliated organizations (both community and work-based) and the GULL website provides an online affiliation process for this purpose at www.gullonline.org/affiliate/. After completing a web-based affiliate briefing and GULL’s affiliation form (which concludes with a series of statements relating to the acceptance of GULL’s code of practice), affiliated organizations can access GULL’s generic ‘getting started’ resources.

GULL’s generic resources consist of a simple but powerful set of forms to enable participants to begin a personal learning journey and these are accompanied by briefing resources for the participant’s own web of support. The following section illustrates this approach with reference to two of the forms.

Personal Learning Statement (PLS)

The designer of these resources, Richard Teare, recommends that learners follow the questions below, write down their answers and ask their personal learning coach or critical friend to give feedback and discuss their PLS with them. Learners can then revise the PLS several times until both learner and coach are satisfied.

Step 1: Consider your current job: What is going well – for you and those involved in your work? What could you do better?
Step 2: Consider the current training or professional development activity you are undertaking: What would you like to accomplish for yourself? For your team/colleagues and/or customers? For your department/section/organization?

Step 3: Consider future possibilities: What new/different types of work would you like to experience? Where do you see yourself in 12 months time? What new skills will you need to achieve your 12 month goal?

Step 4: Summarize what you need to learn (list the key things arising from steps 1–3 above).

Step 5: Personal learning statement: Now re-write what you want to learn in sentence format like an essay in about 750 words. Try to include the timeframe, the resources or support you will need, and reflect on how you will know whether you have accomplished this learning. Then submit your PLS to your personal learning coach and get his/her feedback (orally and) in writing so you can improve and finalize it. Keep the final version of your PLS for future reference, especially when writing the ‘Return on Outputs’ (RO) described below.

Return on Outputs (RO)

The purpose of this activity is for the learner to (a) reflect on the previous weeks’ work and development; (b) identify the key learning outcomes in terms of personal, group and organizational or community development; (c) explain the value of the outcomes; and (d) make recommendations and action plans based on these learning outcomes. You can download the ‘Return on Outputs Form’ free from the GULL website or complete your RO by following the six tasks/steps below and writing 100 to 150 words per section (and 750 words in total):

Step 1: Summarize briefly what you have done in your action learning project or other development activity.

Step 2: What were the key learning outcomes for you? (Please list them)

Step 3: Describe your personal learning and any other benefits for you arising from this activity.

Step 4: Describe the group learning for your action learning set, whole organization and/or community arising from this activity.

Step 5: Explain the value of the outcomes from this activity (e.g., improvements, cost reductions, positive changes in the organization/community, etc.)

Step 6: List your recommendations for implementing these outcomes and outline any further action required.
CHAPTER 2

After you have drafted your responses to the above tasks, ask your personal learning coach or critical friend to give you feedback and to discuss your RO with you. You can then revise it several times until you are both satisfied.

PROBLEM SOLVING: IDENTIFYING PROBLEM AND ACTION

The PLS and RO are individual learning activities. To work well in an action learning set and to solve a particular problem through an action learning/research project, it is important to identify, negotiate and define the ‘thematic concern’. We use this term (Lewin, 1948) that encompasses the topic or central issue to be understood and maybe formulated as a focal question that everyone in the group shares and that is significant to the stakeholders in the community or organization. In other words, we must conduct a needs analysis for defining the thematic concern before designing the project.

Needs Analysis for Defining the Thematic Concern

I have adapted and found the Nominal Group Technique (NGT) most effective and time efficient for needs analysis (and evaluation) purposes, especially for eliciting, defining and agreeing upon a group’s needs and wants generally and for defining the thematic concern in particular. But why is a needs analysis important for defining mutual goals?

Without a needs analysis that is shared and agreed upon by all participants and stakeholders and that is significant for the wellbeing of the particular community, it is likely that some team members will lose interest, commitment and motivation, they will not turn up to meetings, will not be actively involved in problem-solving, or worse, they leave the team and thus may jeopardize the whole project by making it no longer viable. This is the mistake many postgraduate students make when they want to conduct an action learning or action research project in an organization and have a preconceived idea of what they want to do in their fieldwork. But why would busy people in an organization spend their precious time with a PhD student, unless they are as passionate about finding the solution to the problem as the student is?

That is why researchers must first conduct a needs analysis in the organization or community with which they intend to work, to find out ‘where the shoe hurts’ before defining the focal research question for their own research or thesis. Ideally this question should be the same or very similar to the one for their fieldwork, so that the collaborative data collection, analysis and interpretation are directly relevant to the participants and to the student/researcher. The same applies to community workers who want to help improve something in that particular community. Rather than hypothesizing and having preconceived ideas, they need to find out from the people themselves how they see their situation and how they think it can be improved.
There are many methods for conducting a needs analysis, e.g., by face-to-face interview, telephone/skype, video conference, and many techniques such as open-ended questionnaire, focus group or nominal group technique. I have found the last of these, discussed below, to be most effective for a needs analysis (or evaluation) without influencing the people involved. It is important to note that your role is that of a facilitator or process manager, not of a consultant or advisor.

The Nominal Group Technique (NGT) is a proven, effective qualitative method generally for collecting feedback/data from a group of 8–12 people, eliciting their views on some issues in response to a focal question. This method has been described before, for example by Dick (1991, pp. 114–117) and Zuber-Skerritt (2008, pp. 71–75). As these authors indicate, the NGT is appropriate for the purposes of ‘think tanks’, exploring new ideas, conducting needs analysis and/or collecting feedback for evaluating action research. However, the group process needs to be led by an experienced facilitator.

The focal question and its wording are crucial for the success of NGT inquiry and need to be negotiated with the group. The question is normally fairly general and exploratory to allow participants to answer in a wide variety of ways. For example, in one of our community development programs, we agreed on the following focal question: “For you personally, what are the felt needs of the Samoan community to improve the educational opportunities for all?” Please, note that the question always starts with “For you personally …” since it is to elicit the personal views of each person present. The procedure of the NGT normally comprises the following eight steps for data collection, analysis and report writing.

**Step 1:** Participants brainstorm individually and write their responses to the focal question (about five minutes).

**Step 2:** The individual participants’ lists are then compiled by the facilitator into a public list (usually on a board or on flip-chart paper) by a round robin collection of ideas without any discussion at this stage (about 15–20 minutes). The rule is that criticism and judgment of any items are forbidden.

**Step 3:** The facilitator leads the subsequent discussion and clarification of the public statements, collating any overlapping statements on the board/flip chart and numbering all collated statements (about 20–30 minutes).

**Step 4:** This discussion is followed by ranking (about five minutes). Here each participant is asked to select from the list of public statements three items that he/she considers most important, to write these on three separate post-it notes (provided by the facilitator), and then to rank these items (A: most important, C: least important) (about 5 minutes).

**Step 5:** Finally, the group results emerge: the facilitator asks participants to display their ranking notes on a table or board in three rows under A, B and C, showing first, second and third priorities respectively (about 10 minutes).
Step 6: Data analysis: Analysis of the data collected in steps 4 and 5 is easy. The three rows of ranking slips provide (a) instant feedback of results to the group and (b) the basis for a final prioritized list presented in table form. The facilitator/researcher (in collaboration with the participants) writes each item/statement mentioned on the ranking slips in the first column of the table, the number of mentions for each item under A in column 2, under B in column 3 and under C in column 4. The weighting given to A is three points, B two points and C one point – multiplied by the number of mentions for each item. The total number of points is then calculated in the last column for each item by adding up the points from A, B and C. Finally, the table can be re-ordered to show the group’s collective priority list of statements from highest points at the top to lowest at the bottom of the table.

Analysis of the discussion (tape-recorded) is similar to other data collecting methods, but I recommend preparing a brief summary rather than a time-consuming transcription and detailed quantitative analysis, because the purpose is to produce a quick overview and the essence of the group’s main opinions in response to the focal research question.

Step 7: Report writing: It is usually (but not necessarily) the facilitator/researcher who summarizes the process and results (with the attached table of priority) and distributes the draft report for ‘participant confirmation’ or validation prior to publication.

Step 8: Project themes and teams: On the basis of this NGT process and report, participants can identify a number of priority issues that need to be addressed by project teams; and each participant can choose a topic/team to work with.

This procedure is only nominally a group technique (and so the name nominal group technique or NGT), because the information is provided by the individual members in the brainstorming activity at the beginning, and is ranked in the voting at the end of the session. Face-to-face confrontation and competition are largely avoided, but there is still opportunity for clarifying and discussing the provided information, which is essential for participants’ understanding, learning and development. The advantages of this ‘nominal’ group process include the following:

– The process ensures balanced participation from all participants: all have the same amount of time for thinking, generating and ranking ideas. No individual can dominate the discussion. All contributions and votes have equal weight regardless of the status of the participant.
– The process is task-oriented, hence makes effective use of resources and avoids personality clashes.
– It is depersonalized and all contributions become group property to share.
– Group cohesion and purpose are achieved quickly.
– The group stimulus encourages supportive, creative and innovative thinking.
The influence of the facilitator is restricted.

The structure provides a format for closure and final decision on the project.

The group motivation and sense of purpose are high.

Participant satisfaction is higher than in unstructured, open discussions.

There is no doubt that the NGT is a valuable tool for needs analysis, problem definition and evaluation of action research. However, it is constructive here to note the disadvantages of this group process, which include the following:

- The success of the session depends largely on the discussion leader’s facilitation and process management skills. An untrained facilitator might experience discipline and time problems.
- If the group is too small (say less than five or six), the process works less well because insufficient variety and richness of ideas/data limits possibilities and outcomes.
- If the group is too large (say more than 15), the process can be slow and tedious, especially in the phase of collecting individual statements, one by one, to produce the collective list (step 2).
- In this phase (step 2), participants may also be frustrated by the rule that forbids any discussion or criticism.
- The facilitator often needs to interrupt the discussion for time reasons, when participants are still keen to continue the discussion.

However, an experienced, creative facilitator can adapt the NGT, if and when necessary, to avoid most of these problems. I believe that the advantages far outweigh the disadvantages of using the NGT for identifying a group’s needs, concerns, evaluation and/or innovative, creative ideas in response to a focal question. The NGT can be used as a snapshot and an initial exploration of people’s views or needs in a relatively short time collecting data (1–2 hours), analysing data (half an hour to produce the table and 1–2 hours to summarize the main points of the discussion) and report writing (another hour). It is a time/resource effective way of capturing the essential features, identifying problem areas, and giving an indication of a group’s priority ranking of those quality features and/or problem areas its members have identified as significant to them. The results can then be used as a basis for in-depth interviews or larger-scale surveys. The NGT can be used repeatedly – e.g., at the beginning of a LAL program or project to identify the needs of participants in a group, organization or community; during the project for continuing improvement; and at the end of the project to evaluate the overall value, quality and effectiveness of the teamwork in terms of the original group or community needs, aims and goals.

At the beginning of a program/project, needs analysis – like vision building – is important for team building, communication and collaboration. It is normally part of a ‘start-up workshop’ when participants learn the basics of action learning, action research, project planning, management and evaluation. I have described this process in detail elsewhere (e.g., Zuber-Skerritt, 2011, pp. 42–46). Here I briefly outline how to conduct a LAL program with team projects.
CHAPTER 2

Conducting LAL Programs and Projects

In a previous book (Zuber-Skerritt, 2011) I distinguish between LAL programs and LAL projects. A program consists of several projects. It may be an in- or cross-company or community development program. A project is usually an individual or team project conducted in an organization or community, using an action learning team in the workplace. I have been involved in at least three different kinds of action learning, all of them facilitated and supported by an action learning group or ‘set’:

1. An AL set with individual projects, where each participant worked on a different topic/problem (e.g., a group of Master or Doctoral candidates);
2. A collaborative team project, where all members worked on the same topic/problem of mutual concern (e.g., a community project on potable water);
3. An AL program with several AL team projects all related to an overall theme, but with each team working on a specific issue/concern/problem (e.g., a program on church mobilization with several projects focusing on different issues such as youth detention, literacy and numeracy, family violence, access to higher education, and so forth).

In this book, we assume that in community development all three paths for action learning are possible. But we see that the third is most useful for effective and sustainable community development since it enables a more comprehensive and broader, deeper-reaching approach. An AL program involves more community members who are able to collaborate and cascade their learning to others in the community. The main stages in such a program are:

Stage 1: Needs analysis of (1) the community using the NGT discussed above; and (2) each LAL team using the SWOT analysis discussed later in this chapter.

Stage 2: Start-up workshop – relationship building; vision and team building; introduction to LAL; project design, management and evaluation; qualitative research methods for data collection and analysis; and writing and publishing, if LAL projects are action research projects.

Stage 3: Project work and meeting regularly in teams, with monthly or bi-monthly program meetings for all teams to monitor their progress (through team reports), discuss any problems they might have, and identify how groups may best support each other in their projects towards the shared goals of the program.

Stage 4: Midway specialist workshop, if required, to meet participants’ particular needs. Otherwise, the individual teams continue to meet regularly, focusing on solving their team problem, issue or concern.
Stage 5: **Concluding workshop** to finalize project results (in team reports), clarify any emergent problems/questions, stimulate reflective evaluation, and help teams with preparing their oral presentations and written reports (or action research papers for publication).

Stage 6: **Presentation and celebration** day as the highlight of the program.

In this and the previous chapter we have already discussed stage 1 and stage 2: relationship building; vision and team building; and introduction to LAL. The other topics in stage 2 may need in-depth or basic explanation depending on the participants’ goals and level of experience. For instance, if participants have some action learning or research experience and want to do action research, they need to understand clearly how to conduct a program, project and qualitative research and how to write and publish an action research paper. They are likely to have access to the literature and to the Internet. Therefore, I refer them to the references under the ‘further readings’ section at the end of this chapter.

Through the following simple questions I try to help people in remote and disadvantaged communities who are interested in focusing on learning and development, rather than on research and publication. These people may find the questions helpful for designing and managing their project as a team.

**Project design, management and evaluation** (Stage 2):

- **Goals**: What are your project goals?
- **Outcomes and benefits**: What are your expected outcomes? Who in the community will benefit from these outcomes? How will they benefit?
- **Evaluation**: How will you know whether you have achieved the intended outcomes, or what outcomes you have achieved?
- **Action plan**: What action do you plan to be taken to achieve your goals? Why? How? By whom? By when (timeline)? Do you need to make a budget? If you do: What resources do you need? What is available and what do you need to find or develop? For example, people (skills, knowledge, support staff, people from other communities, networks), financial and physical resources (equipment, space).

Stage 3 (monthly meetings of all teams), stage 4 (midway workshop), stage 5 (concluding workshop) and stage 6 (presentation and celebration day) need a facilitator to organize and manage the process of these events with collaboration from participants. I recommend the useful guide for facilitators ‘Helping groups to be effective’ by Bob Dick (1991) and the workbook by Ron Passfield and Anne-Marie Carroll (2013) on ‘strategic project planning’. The latter is based on a model of strategic planning (Figure 2.3) originally developed by a design team of the Queensland University Action Learning (QUAL) Program discussed and evaluated by Passfield (1996). I have frequently used this model in workshops with practitioners, academics, postgraduates, senior managers and community leaders in various countries; and it always works well. We call the model ‘figure 8’ because it
consists of two iterative cycles, the upper one on context analysis and the lower one on planning for improved practice, joined together by a third component: vision. The workbook describes each component, cycle and stage and includes activities for project teams to follow step by step. I have described the process of designing action learning and action research programs in detail in earlier works (e.g., Zuber-Skerritt, 2002, 2011, pp. 41–46). Here I reprint the model and recommend that you use it together with the Workbook by Passfield and Carroll (2013).

![Figure 2.3](image)

*Figure 2.3. Figure eight: the process of project design and management (Zuber-Skerritt, 2002, p. 145)*

If you do not have access to the Internet, follow these simple steps:

*Step 1:* Start with the *vision exercise* described above.

*Step 2:* *Stakeholder analysis:* List all stakeholders (internal and external) who are interested in or affected by the implementation of your project. Who have high/low influence and impact on the success of your project? Who will support or oppose your project? What can you do to get the support of highly influential stakeholders
and avoid interference from others? Who is your main sponsor or supporter you can rely on and must keep informed?

**Step 3: SWOT analysis:** What are the strengths, weaknesses, threats and opportunities of (a) the project, and (b) your team members? How can you build on the strengths and overcome or avoid the weaknesses?

**Step 4: Constraint analysis:** What are possible constraints and difficulties? How can they be overcome?

**Step 5: Resources analysis:** List and discuss what your existing resources are and what additional resources are necessary for the project. What do you need to do to obtain them?

**Step 6: Vision revisited:** After your context analysis (steps 2–5), you might have to change your vision to make it more realistic in light of the above discussion.

**Step 7: Planning for improved practice:** You start with an analysis of your situation in the organization or community and the focal problem you want to solve (see ‘needs analysis for defining the thematic concern’ above). Then discuss your project and reach agreement on:

– Aims and objectives;
– Desired outcomes;
– How you will know whether you have achieved these outcomes;
– An action plan in matrix form (what has to be done, by whom, how, by when); and
– Evaluation strategies and methods.

This ‘figure 8’ process of vision building, context analysis, revised vision and planning for improved practice is repeated several times during the project implementation.

**ACHIEVING AND CELEBRATING RESULTS**

It is important to all involved in a LAL program or project – whether as participant, coach, facilitator or stakeholder – to achieve tangible (and intangible) results by setting a timeline from the very beginning with an end date when project results and learning outcomes must be demonstrated and presented to a larger audience, e.g., the whole community or organization, family, friends, stakeholders, and the media if possible. If planned well, this is not a stressful experience but is actually rewarding and enjoyable. That is why the presentation has to be well prepared and practised in the concluding workshop. Oral and written presentations are vehicles for individual and team learning, reflection and conceptualization, as well as evidence of community or organizational development, innovation and achievement. The presentations are also evidence and demonstration of participants’ effective communication and collaboration.
Preparing for Public Presentation

We always schedule time in the Concluding Workshop for discussion with participants on what findings they are to present and how (often using Power Point presentations and video, song and dance), and whether and where they intend to publish their outcomes. In unstructured action learning sessions, opportunities for skill development in public presentation and accountability procedures are often missing, so that learning and development become unnoticed, not appreciated and not duly rewarded. However, if we provide participants with the opportunity to commit their thoughts and findings to writing and public scrutiny, action learning becomes action research. The experience of oral and written presentations is of great value to participants’ professional development and to their organization’s or community’s reputation or legacy. I am always astonished at the amount of hard work, effort and enthusiasm that team members contribute to ‘get it right’ and when they do, the joy and satisfaction they display. So it is worth spending some time on developing presentation and writing skills and setting aside two or three hours for a special presentation and celebration day.

Final Presentation and Celebration Day

This well structured and organized event is always the highlight of LAL programs/projects. Here the project teams present brief reports outlining their aims and objectives, achievements, improved performance and learning outcomes for themselves and their community, and their further action plans. The wider community, including representatives from communities, government, NGOs and business, as well as stakeholders, colleagues, families, friends, and media are invited to witness and join the celebration. If time permits – depending on the size of the program (i.e., number of projects and team members) – individual participants may have the opportunity to tell the story of their personal learning/change/growth and professional development and its impact on their work, community and/or family. All enjoy music, dance and performance and refreshments or a celebration dinner. For me, these events are unforgettable, especially in cultures such as in Africa where the participants palpably express the joy of their action learning experiences and achievements in song and dance. The spirit of the music, drumming and powerful rhythm acknowledges our fulfilment as we say, ‘Our shared effort was worth it!’ Most of the videos mentioned in Chapters 3–6 illustrate this joy.

CONCLUSION

In this chapter I have enmeshed the concepts of my approach to, and experience of, action learning (and action research) over the past 30–40 years with the learning concepts driving my co-author Richard Teare’s new system of developing lifelong learning through the Global University for Lifelong Learning (GULL). I have incorporated the GULL processes of Personal Learning Statement (PLS),

50
Diary Format (DF), Return on Learning Outputs (RO) and Personal Learning Coach that are now working effectively to promote community development in poorer parts of the world through GULL’s grassroots approach to local knowledge creation and learning. To enable readers to activate this synthesis of our approaches in lifelong action learning (LAL), I have introduced some simple strategies and methods for developing LAL in individuals, teams and whole communities or organizations.

While we recognize that there are many approaches to community development, in the limited space of this chapter I have focused on the activities I have found most useful and effective for transformational learning and development. My discussion in this chapter has put some practical flesh on the conceptual bones for thinking about lifelong action learning introduced in the previous chapter. It provides scaffolding for the further practical flesh that Richard provides in his discussion of LAL in practice in the following three chapters. Richard’s discussion of LAL on the ground – by people in poor rural communities, as they have learned actively to address their problems with their own local knowledge, resources and energies – will further develop readers’ understanding of LAL and how it has been, is being, and can be applied effectively for community development, especially among those in greatest need.

In summary, I have introduced five of the key principles of LAL:
1. Reflection;
2. Communication and collaboration;
3. Self-directed, autonomous learning;
4. Problem solving: identifying problem and action; and
5. Achieving and celebrating results.

I have matched these principles with processes and activities that you can undertake yourself and/or facilitate to put these principles into LAL practice among others:
1. A reflection diary and Diary Format (DF) for daily, weekly and monthly reflections;
2. Relationship/vision/team building (using the snake technique and turning points exercise) and using the Socratic approach;
3. Personal learning statement (PLS) and statement of return on outputs (RO);
4. Needs analysis (using the Nominal Group Technique) for defining the thematic concern; and conducting a LAL program with team projects (using the figure 8 model); and
5. Preparing for presentation; and the final presentation and celebration day.

On the basis of the above principles and processes, I have developed a model of LAL (Figure 2.4) for unlocking human potential in a practical and systematic way.

I have learned from experience that through these principles and activities of LAL it is possible to enable everyone who is willing and open to unlock the fullest scope of their human potential. This is because: Inside every person is a unique brilliance that needs to be discovered and nurtured. By unlocking this brilliance in each individual person through LAL, we help to open a world of possibilities that is a better world for the individual, the group, the community and our global
CHAPTER 2

society. It can also be a joy as well as deep care and effort for all of us involved in the process of LAL for community development.

Principles

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<th>Reflection</th>
<th>Communication and collaboration</th>
<th>Self-directed learning</th>
<th>Problem solving</th>
<th>Achieving results</th>
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Figure 2.4. Principles and activities for developing lifelong action learning

We all are unique, each one of us with distinctive gifts or talents to contribute to our shared wellbeing as well as to harness for our own. Appreciating and understanding how to use our unique gifts can help to alleviate the many pressures we face and enrich the quality of our lives. For example, the feeling of personal inadequacy through low self-esteem can be overcome by helping others; the pressure to perform a task to which we are not well suited or to fulfil too many roles can be eased by working with others as a team whose members share their different gifts, rather than struggling on our own. Two quotations are harmonizing in my mind here: (1) Aung San Suu Kyi’s call to action: If you’re feeling helpless, help someone! and (2) U.S. President Lyndon B. Johnson’s claim: There are no problems we cannot solve together, and very few that we can solve ourselves.

The key principles and strategies of LAL are significant to making a positive difference in this world and therefore contributing to a better world. All of these principles and processes are also reflected in GULL and lead to evidence-based learning. Richard Teare demonstrates this in Chapter 3 where he explains the GULL system in more detail, illustrated by an example of professional learning and development with certification of learning outcomes for NGO staff and volunteers. I discuss the issue of GULL’s recognition in Chapter 7.

TOPICS FOR DISCUSSION

1. Recognizing a need, how would you start a LAL project or program (relationship building, needs analysis, defining the thematic concern, etc.)?
2. How would you design, implement and evaluate a collaborative LAL project?
3. Formulate your ‘Personal Learning Statement’ (PLS) and find a coach for feedback.
4. Reflect on major learning events in the coming 4–6 weeks, using the daily, weekly and monthly diary format (DF).
5. At the end of this time, identify your ‘Return on Learning Outputs’ (RO) at the individual, group, organizational or community levels, and provide evidence for this transformational learning, change or development.
6. Prepare an oral presentation and a written report of this journey of lifelong action learning; and
7. Proceed to the next cycle in the spiral of further LAL cycles.

FURTHER READINGS


NOTES

1 Source: Pope and Denicolo (1991, p. 106, out of print) reprinted with permission from the authors (by emails of 6 and 9 February, 2012) and from the book editor (© Ortran Zuber-Skerritt).
2 Reprinted in Appendix 2.4 with Bob Dick’s permission (email 8 February, 2012).
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REFERENCES


**APPENDIX 2.1**

**DAILY SUMMARY**

**Today’s activity list**


**What went well and why?**


CHAPTER 2

What didn’t go well and why?

What could I have done differently and how?

APPENDIX 2.2
WEEKLY SUMMARY

The week’s main activity list
### What went well and why?

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### What didn’t go well and why?

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### What could I have done differently and how?

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CHAPTER 2

What have I learnt this week?

Discussion points for my learning coach
Discussion outcomes

APPENDIX 2.3
MONTHLY SUMMARY

The month’s main activity list
CHAPTER 2

What went well and why?

What didn’t go well and why?

What could I have done differently and how?
What have I learnt this month and what do I need to learn next month?

Learning coach written comments

Date completed:

Internal reviewer written comments

Date completed:
APPENDIX 2.4
“TURNING POINTS EXERCISE”
AN ACTIVITY FOR BUILDING RELATIONSHIPS IN SMALL GROUPS

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Form small groups

Form small groups of three (or at most four) people. As far as possible, work with people you don’t know rather than with people you do. Aim for groups that are as diverse as you can make them. Exchange people between small groups to improve the group composition.

Individual work

Think back over your life so far. Begin with your first memories and work towards the present. As you do so, identify “turning points” – events, or people, or both, who made a difference. As you identify a turning point, note it down.

When you have six or more turning points, choose three that you are willing to talk about in your small group. For each of these three turning points, prepare brief answers to these three questions:
– What happened?
– Why was it a turning point?
– What are the turning point’s present results – what does it say about you, now?
– How are you different as a result of that turning point?

It’s best not to write detailed scripts that you have to read. Keyword notes are enough.

Exchange information in small groups

Reassemble in your small groups. Each person in turn tells of one of their turning points. When each person has told of one turning point, go around the group for the second turning point. Repeat for the third turning point. (In other words don’t relate all three turning points at once. Go around the small group three times.)

When you’re relating a turning point, look at the other people in your small group. When someone else is telling you of their turning point, give them 100 per cent of your attention.

Debrief in small groups

At first individually, and then in discussion, answer these three questions:
– Did the exercise make a difference about your feelings towards your group colleagues?
– If so, what difference did it make?
– If so, what was it about the exercise that led to that difference?