THE LEARNING COMMUNITIES HANDBOOK

COLLECTIVE IMPROVEMENT IN COMPLEX ENVIRONMENTS

LOUISE WILSON & DR TOBY LOWE

Newcastle University

THE LEARNING
COMMUNITIES HANDBOOK

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THE MESSY ROAD TO HERE

Toby's journey started with a problem to solve - how to talk about quality in participatory arts work. Participatory arts work is subjective and complex. It is not amenable to simple standards or criteria. So Toby developed a way to enable artists to talk about the detail of their practice with one another – to reveal the detail of the judgements they made – to see what would happen. The problem of how to have rich conversations about what 'doing this work well' looks like isn't unique to the arts domain – talking about complexity is something that is useful to lots of different people. And this was the foundation that became the Learning Communities approach. Toby set out to test and refine the approach in a range of other settings, discovering that regardless of their profession or discipline, practitioners valued a way to talk honestly about their practice with peers, to collectively learn how to 'do this work well' under uncertain and complex conditions.

Louise's story starts with a conversation over the kitchen table with Toby – how to talk about quality in every day practice, how to know it's making a difference. Louise's subsequent experience as a Learning Community member, combined with her facilitation training, resulted in Toby and her developing a programme of training and support materials for Learning Community members, sponsors and facilitators. This has been supported by an Economic and Social Research Council (ESRC) Impact Acceleration funding from Newcastle University.

There is a growing network of Learning Community facilitators with the knowledge and skills to set up, design and run Learning Communities to support practitioners wherever they face uncertainty and complexity.

THE MESSY ROAD TO HERE

HOW TO USE THIS HANDBOOK AND MAKE IT BETTER

The handbook has been designed to accompany the Learning Communities training and provide a step-by-step guide to setting up, designing and running a Learning Community.

The first version, published in Autumn 2017, was written by a small group of authors. Subsequent materials have been added by Learning Communities Network members, in response to their experiences and needs. In the spirit of collective improvement, we'd love you to incorporate your practical wisdom via the Network. You will find Network information at the back of this handbook.

We recommend completing the Learning Communities' training and joining the Network but it isn't essential to get a brilliant Learning Community off the ground. Either way, our advice is stay close to the philosophy, follow the co-design principles and stick broadly to the structure. And how to use the handbook is down to you.

Share, develop, use, annotate, challenge. We hope you find it a useful resource on your own messy path.

DEFINITIONS
Learning Community **members** are **participants** – practitioners who join sessions. Facilitators are those whose role is to help members design and maintain the trusted space that is needed to talk authentically about judgements and uncertainties.

The term sponsor refers to those organisational leaders or managers whose support and authorisation might be needed for the Learning Communities approach to be introduced. Individuals may have multiple and even rotating roles in one or many Learning Communities. That is, a team leader might sponsor a Learning Community for their team and be a member of a different one. Members may facilitate other Learning Communities or the facilitation role might be shared between members. These are all design questions for the sponsor and group to consider.

1.

INTRODUCTION TO
LEARNING COMMUNITIES

WHAT IS A LEARNING COMMUNITY?

A Learning Community is a group of peers who come together in a safe space to reflect and share their judgements and uncertainties about their practice and to share ideas or experiences to collectively improve.

A shared understanding of what excellence looks like is co-created. This peer – or horizontal – accountability is core to the Learning Community purpose: the approach has its roots in complexity theory and the benefits arising from adopting a 'positive error culture'.

WHAT IS THE PROBLEM THAT LEARNING COMMUNITIES CAN HELP SOLVE?

Most people and organisations operate within complex, sometimes chaotic, settings. Our 'clients' – customers, patients, people - have complex lives and the services and support that organisations offer are part of a wider picture for them. And yet we are asked to focus on outcomes and count the 'success' and impact of the work we do. In these complex systems, arguably the most important skill is to be able to reflect and adapt. Participating in a Learning Community allows us to connect with our peers who are close to similar work and learn from each other to collectively share and improve.

WHAT MAKES THE LEARNING COMMUNITIES APPROACH SPECIAL?

There are countless improvement methods – many of them complementary to this approach. So why are Learning Communities different and what will participants, leaders, organisations and their clients experience which will be different?

> Learning Communities are **evidence-based** – the approach is grounded in evidence and theory

> Learning Communities build **trust** – the approach connects peers and builds networks allowing practitioners to tackle the real challenges they face

> Learning Communities are **empowering** – the approach builds capacity, skills, knowledge, confidence and agency for change amongst practitioners

> Learning Communities support **prioritisation** – the approach allows leaders and champions to focus on issues more relevant to their practice

> Learning Communities are **action-focused** – reflections and sharing lead to real action rather than just talking about them

> Learning Communities are **sustainable** – the set up, design and running incur low overhead, even when using external facilitation

> Learning Communities are **pragmatic** – the approach allows for experience, data and policy to inform collective learning

> Learning Communities tackle **unwarranted variation** – the approach allows pratitioners to share practice-based knowledge

WHAT DO PEOPLE TALK ABOUT IN LEARNING COMMUNITIES?

Learning Communities might take a ***case-study*** approach to practice, using the structure in section 3 or a ***thematic*** approach, taking a broad topic for discussion.

An analysis of the types of case studies and group conversations shows the sorts of things people talk about in Learning Communities.

PROVIDING CONTEXTUAL INFORMATION

This takes the form of setting out details of the specific topic under review – who was involved (which could include describing the client, their history, basic demographic information and support needs) and details of the presenter's actions (relationship building, understanding client needs, challenging client behaviour, working with clients, identifying issues with the wider system).

EMOTIONAL CONTENT

In response to a presenter's outline of a case or specific incident, Learning Community presenters would spontaneously offer their feelings: "This is an emotive case for me. I've put a lot of time into it."

EMOTIONAL SUPPORT AND REASSURANCE

Staff would ask one another about their feelings in respect of particular cases and their actions: "How does this case make you feel?" Other Learning Community members would often offer empathetic responses, "I feel your pain."

Other Learning Community members would provide positive reinforcement for actions: "You've done everything you can do". This sense of 'you've done everything you could' was a very common expression across the Learning Communities.

UNCERTAINTY AND MISTAKES

The most common question that staff asked one another, which spoke powerfully of their uncertainty, was "what should I do next?"

SENSE-MAKING

Sense-making activity includes the conversations which enabled the group to try and understand the meaning of particular behaviours, languages, courses of action and contexts.

Through discussions in a Learning Community, participants explicitly began to recognise that a dialogical approach (Sullivan 2012) to truth and meaning-making was required for them to make good decisions. For example, in one group, there was a particularly significant exchange in trying to make sense of a situation where the presenter experienced dissonance about what a client was telling them and other behaviours.

PROBLEM SOLVING AND INFORMATION SHARING

Participants offered each other potential and tangible ways forward with the particular challenges that others had identified – this problem solving, based on skills, knowledge and experience, is an expression of problem-based learning.

Similarly, sharing practice tips –in addition to suggesting particular solutions to particular problems, participants suggested the use of processes and methods which they had found useful: "Have you considered drawing maps of her life with her?"

Information sharing is a major theme in Learning Community conversations - staff often share their detailed knowledge about particular services that are available to particular situations or types of clients, and about the best way to access such services.

REFLECTIONS ON WHAT 'GOOD PRACTICE' LOOKS LIKE

Typically, Learning Community members explore quality themes - what does this job entail? What are the boundaries? What does my job not entail?

And importantly, members challenge one another's practice, asking why particular judgements or actions have been taken, or what led the practitioner to interpret a situation in a particular way.

WHAT IMPACT DO LEARNING COMMUNITIES HAVE?

Qualitative research, including interviews with Learning Community participants and sponsors, indicate the following impacts and benefits which form part of the business case for operating a Learning Community.

TEAM BUILDING

> Improved knowledge about each other's work – moving from individual or small cohort to cross team perspective
> Learning about each other as people
> Built trust in one another
> Confidence to share problems and learn from one another
> Deeper, more rich conversations between team members
> Shared understanding of problems between team members
> Improved collaboration

LEARNING FROM OTHERS

> Sharing hints and tips about practice from experience
> Sharing learning from formal training
> Sharing knowledge about services, offers or opportunities
> Having the confidence to say 'I don't know'
> Developing an open culture and the permission to say, "Does anybody else know what to do here?"
> Enabling improved peer support where colleagues seek help from each other rather than line managers unless particular senior guidance needed
> Listening to colleagues more including improved equality of voice
> Increased understanding and undertaking of reflective practice
> Collective sense-making
> Improved collaborative problem-solving and innovation
> 'No wrong answer' approach in discussions

INCREASED ABILITY TO MAKE JUDGEMENTS IN COMPLEX ENVIRONMENTS

> Forming a critical mass of those talking about uncertainty allows a realistic picture of the environment and challenges to be drawn
> Increased reflexivity
> Recognition of 'no right answer'
> Encouraging action – participants report feeling 'braver'

OTHER IMPACTS

> Reassurance and reduction in stress
> Improved communication between staff and managers
> Increased focus on own performance improvement

WHAT DO MEMBERS SAY THEY VALUE ABOUT LEARNING COMMUNITY SESSIONS?

> Learning from one another's experiences
> Opportunity to approach difficult topics
> Focus on the future – what can we do? What can we learn from what we've done?
> Learning together – everyone can evaluate experiences
> A safe space to be open and free from judgements
> Reassurance that other people feel the same or practical help overcoming anxieties if they don't
> Building trust in a team and relationships with peers
> Everyone's experience is valid
> Space for reflection and thinking
> Finding shared solutions and collective problem solving
> Constructive challenge, peer review and critical friends
> Voice for a group
> Cross organisational learning
> NOT about progress monitoring
> Investment in personal development

2.

2. THE THEORY AND PHILOSOPHY OF LEARNING COMMUNITIES

THE LEARNING COMMUNITIES APPROACH DRAWS ON A VARIETY OF THEORETICAL PERSPECTIVES.

COMPLEXITY

People working within complex systems face uncertainty every day, as they cannot be sure what will result as a consequence of their actions.

There is an increasing understanding that "social interventions are complex systems thrust amid complex systems" (Mowles 2014). Complexity approaches to social issues are therefore required (Byrne and Callaghan 2014).

Further complex systems adapt and change through collective reflection from the people who make up such systems (Lowe, Wilson and Boobis 2016). Learning Communities are mechanisms for people to explicitly acknowledge the uncertainty they feel, and to enable their systems to adapt through collective reflection.

This is a system map for obesity (Vandenbroeck et al. 2007: 74) showing all the factors that contribute to whether someone is obese or not, and the relationships between them:

Foresight
Obesity System Map

The map shoes the incredible level of complexity which lies underneath the outcomes we seek. Imagine your job is working to reduce obesity – this map shows the wide range of factors that contribute to that outcome. It shows the limited part of the system that any one of us works in. And this means that anyone operating in a complex system is bound to feel uncertainty about their work – they're having to make judgements about a course of action where they can't possibly know with certainty what the outcome will be.

And if people are making these difficult judgements in situations of uncertainty every day, the only thing that is 100% guaranteed is that they will make mistakes.

CONCLUSION?
Working in complex systems means that mistakes and uncertainty are guaranteed.

SO HOW DO PEOPLE IN THOSE SITUATIONS GET BETTER AT THEIR PRACTICE?
HOW DOES PRACTICE IMPROVE?
The answer is that we need to get better at making judgements in situations of uncertainty. We need to improve our capacity to be comfortable with uncertainty, and our ability to act within it.

HOW DO WE DO THAT?
Firstly, we need to be comfortable sharing our mistakes and uncertainties with our colleagues - we need a positive error culture. To do that, we must be able to provide a detailed account of our judgement making to our peers. Safe spaces are needed in which we can do that.

POSITIVE ERROR CULTURE

A positive error culture (Gigerenzer 2014) exists within an organisation when the practitioners in that organisation feel comfortable talking about their own mistakes or uncertainties. Organisations, or sectors, with a positive error culture see mistakes and uncertainty as natural and unavoidable (because of complexity), and view them as opportunities for learning and improvement. Positive error cultures are important enablers for adaptation and improvement in complex systems, because they enable collective reflection about what is actually going on, and how things really work (or not). Learning Communities offer a means to respond and improve.

COMMUNITIES OF PRACTICE

Wenger (1998) described the way organisational learning happens through informal community-forming processes amongst people who work together. He called these learning mechanisms 'communities of practice'. Wenger and Lave (1991) tell us that 'humans learn best in communities of practice' and that learning is not a 'one person act'.

Learning Communities systematise aspects of the role that informal communities of practice play in organisational learning. Learning Communities are a way to build conscious, reflective communities of practice, which create positive error cultures in organisations.

CO-DESIGN

Groups of practitioners create a bespoke space for reflective conversation that enables them to have the conversations they need. Participatory design theories underpin the design stage for Learning Communities. Learning Community participants design what that group needs to create a trusted space for rich conversations about practice.

HORIZONTAL ACCOUNTABILITY

Practitioners provide a detailed, honest account of their practice to one another in the Learning Community setting – how they do what they do, and why they make the judgements and decisions they take. Learning Communities offer something different about the idea of accountability – a horizontal version of accountability that involves peers holding one another to account, where 'answerability' and governance comes into the domain of peers.

LEARNING THEORY, REFLEXIVITY AND REFLECTIVE DIALOGUE

Learning Communities offer participants the spaces and occasions to reflect on their practice collectively. There is a substantial body of literature which positions reflexivity, particularly the importance of dialogue and the social context, as a means for achieving 'deep' learning. There is a particular value of group reflection which offers something over and above reflecting alone – reflection is more than 'sitting having a think' - it is more akin to critical analysis.

Brockbank and McGill (2007) tell us about Dewey's belief that,

…the essentials of learning are identical with the essentials of reflection (p21).

Stonehouse and Pemberton (1999) describe learning as "an active response and represents a conscious effort to develop". Bennett (1997) tells us, "to learn means to absorb knowledge, acquire skills and/or assume fresh attitudes."

Brockbank and McGill (2007) continue,

Learning as a social process is crucial because transformational or critical learning requires conditions that enable the learner to reflect upon her learning not only by herself but with others… The idea that learning happens in a social vacuum devalues collaboration between learners and learning communities… Social constructivists tell us that we create rather than discover ourselves…we do this through engagement with others (p65).

They list five requirements for reflection – dialogue, intention, process, modelling and notion of personal stance, stating,

It is through reflective dialogue that reflective learning can be encouraged….Being able to undertake reflection alone is necessary but not sufficient (p65).

Russell (2005) supports this,

Fostering reflective practice requires far more than telling people to reflect then simply hoping for the best.

Argyris and Schon (1974) describe the differences between 'espoused theory' and 'theory in use' (p11), that is, the gap between what we say and what we do. There may be other levels in here, considering the Johari Window model, of 'what we think we say' and 'what we think we do'. They argue that we can 'unpack' this gap through reflective dialogue.

Brockbank and McGill (2007) state,

It is through reflective dialogue that reflective learning can be encouraged…. Dialogue that is reflective and enables reflective learning engages the person at the edge of their knowledge, their sense of self and the world as experienced by them (p65).

Learning Communities support this sort of group reflexivity through the co-design and through the session structure – practititioners are invited to share and collectively reflect.

KNOWLEDGE, SKILLS AND PRACTICAL WISDOM

The Learning Communities approach is rooted in an Aristotelian paradigm that learning is derived from 'doing'. The approach facilitates participants to apply their knowledge and practice being practitioners.

WHAT DOES THIS MEAN IN PRACTICE?
How do practitioners answer the question: what should I do in situation X? Aristotle identified three forms of knowledge.

• Episteme – our theoretical knowledge. So, for example, if you're a mental health practitioner, and you're trying to answer the question: what should I do when working with a disturbed adult patient, you might draw on theory about early childhood trauma. If you're a substance misuse practitioner, working with a client, you might draw on ideas of 'recovery capital' to help guide your work.

• Techne – our skills or craft knowledge. To answer the question – what should I do in this situation, the mental health worker will draw on their relationship building skills, or the technique of motivational interviewing that they've been trained in.

• Phronesis – practical wisdom – the ability to make judgements in situations where our theory and our skills have only given us part of the answer.

Most education and training programmes are built on forms 1 and 2 – help people to develop the theory, and the skills to act well in a given situation. But what to do when real life doesn't match the text books? There is often no right answer. Because the answer will be different for different clients, at different times. What works one day, won't work the next. We've reached the limit of theory and skill. What's needed is judgement.

Learning Communities are developing people's capacity for phronesis – their practical wisdom.

3.

The job of setting up a Learning Community is a process of co-design – the facilitator's role is to help a group of people create and maintain a trusted space for themselves.

As facilitator, you may be the instigator of a Learning Community, seeking permissions and negotiating with organisational gatekeepers as well as designing and running a group – or some of these steps might be done by others. If you are joining at step 2 or 3, make sure you know the outcome of the first phase negotiations and the co-design principles agreed by the group.

CREATING A LEARNING COMMUNITY:

WHAT NEEDS TO BE IN PLACE?

ONGOING: REFLECTION AND EVALUATION

PHASE 1: NEGOTIATING THE SPACE

PHASE 3: FACILITATING LEARNING COMMUNITIES

PHASE 2: DESIGN PROCESS
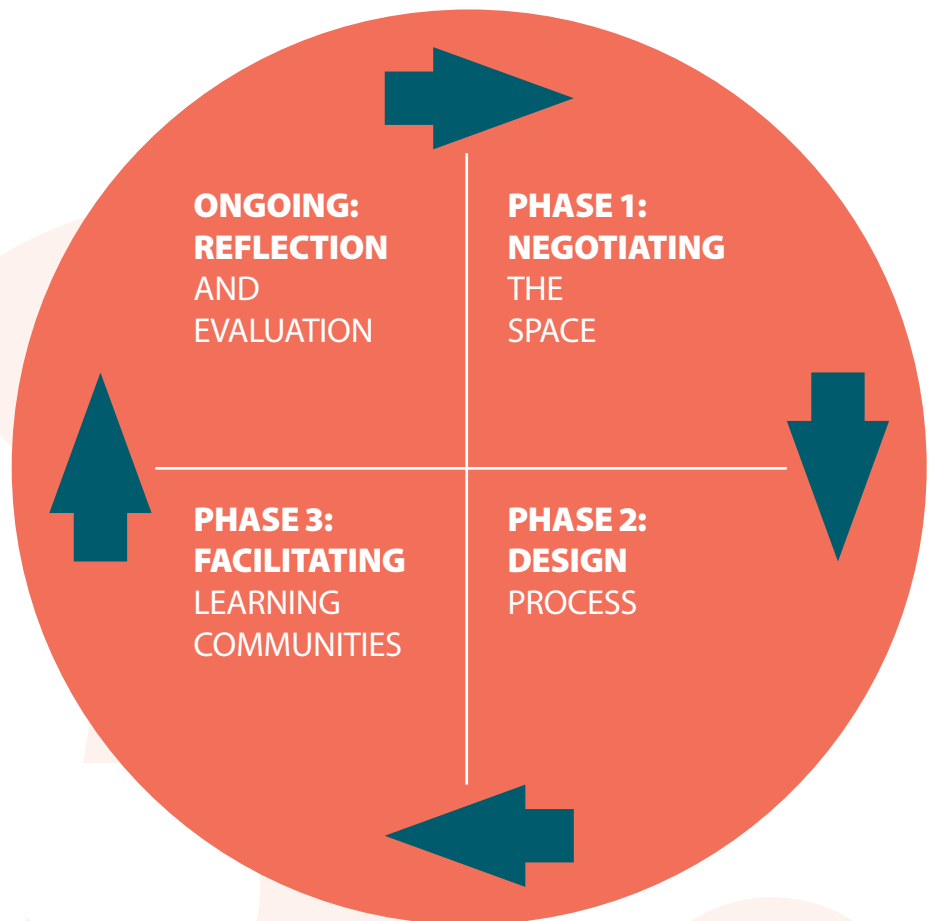
PHASE 1:

SETTING UP A LEARNING COMMUNITY: NEGOTIATING THE SPACE

Negotiating the space means working with a sponsor or champion in an organisation who can give permission and create the time for people to be able to develop a safe space. What are the institutional contexts and permissions that need to be negotiated to make this work?

All this is leading up to a co-design session where you work with the group of people who will be participating in the Learning Community to create a trusted space to talk about uncertainty.

PERMISSIONS AND SUPPORT

To set up a Learning Community, someone in an organisation will need to support getting things going, approve the process and to make sure it gets the appropriate support from colleagues, which may include funding if needed. In those discussions, cover the following elements of setting up a Learning Community:

• Who needs to give permission?

• How does a Learning Community relate to other systems? e.g. clinical supervision, performance management?

• Identifying and overcoming barriers e.g. admin support and other organisational barriers

• How will the organisation communicate about the new Learning Community to proposed participants and to others? How will time be allocated to take it seriously?

• Is this compulsory for participants?

• Who will be the senior champion for the Learning Community, who can unblock problems the facilitator encounters that are outside the remit of the group to 'self-solve?'

WHO CAN CHAMPION MY LEARNING COMMUNITY?

The Learning Community membership may be champions or leaders in their own right but often negotiating with team, organisation or sector leaders will be needed to get a Learning Community of peers established. Starting a conversation with the people who can release participants from their day-to-day commitments will be crucial. Some of the design work will be done in these conversations and inform the later design work with group members. Communicating the purpose and benefits of a Learning Community may be needed here too. Consider, too, at this stage if additional resources will be needed and what help is needed from the sponsor.

3. LEARNING COMMUNITY DEVELOPMENT

AGREEING THE ARRANGEMENTS

In setting up a new Learning Community, agree the following at the negotiation stage with the sponsor, noting that this is a framework in which participants will design their own group in phase two.

Selecting a facilitator: Agree who will facilitate the co-design and subsequent sessions.

• External, funded facilitator, contracting a professional Learning Community facilitator at an agreed rate or fee

• External quid pro quo facilitator, exchanging facilitators with another Learning Community that wants external facilitation

• External pro bono facilitation, seeking a facilitator who will design and/or run a group voluntarily

• Internal facilitator (non-member), seeking a facilitator from within the organisation but who isn't a Learning Community member

• Internal facilitator (member), asking the group to agree facilitation terms at the co-design stage

It may be that for some groups, a co-facilitator would be a beneficial addition. Consider the possibility of designing in scope to have observers, trainee facilitators or second facilitators.

AGREEING CONSTITUENCY AND HOW MANY PEOPLE IN THE ROOM:

Agree who the Learning Community is for, noting the principle that Learning Communities are for peers to reflect on practice so consider if participants will be close enough to offer challenge, support and learning on likely topics.

WHAT ADMINISTRATION SUPPORT IS AVAILABLE?

Can the organisation provide a room or other administrative support? Should the group coordinate this themselves and agree detail at the co-design session?

PREPARING FOR THE CO-DESIGN SESSION:

The sponsor's role will be to coordinate the arrangements for co-design session, making sure a date, time and venue is set. The sponsor will ensure that the new cohort are supported to attend and understand the purpose and principles of the Learning Community. The room should be set up board room or horseshoe style with usual refreshment arrangements for that organisation and audio-visual kit if needed.

OUTLINE SOME REPORTING PRINCIPLES:

What does the sponsor require in terms of measures, impact accounts or metrics? To what extent are these in the 'gift' of the group for the community design? Note the principles of Learning Communities in shaping what the sponsor may reasonably request and then transparently address this in the groundrules design.

ROLE-MODELLING TALKING ABOUT UNCERTAINTY:

Agree who will 'go first' and present their practice to peers at the co-design workshop. This is essential to make the purpose of the Learning Community become real and live for future meetings, and enable the co-design to be meaningful.

AGREEING A BRIEF FOR THE PRESENTER:

This almost certainly requires having a meeting with the person chosen to 'go first'. It is the role of the facilitator to work with the 'role model' to agree how they will present their practice into the design session. Will they take a case study or thematic approach? How long will they present for? What is the brief which the presentation should address? This will need to answer the following questions:

• How will you present the detail of your practice to others?

• How will you describe the context of the work, so that people understand?

• How will you talk about mistakes/uncertainties?

• What questions do you want to ask of the group about your practice?

This brief for the presentation must be written down and agreed with the role model, as it will be part of what the group reflects on in the 'design' session. Also, the facilitator is well placed to advise on choosing the role model – someone who is confident enough to talk about uncertainties in their practice, and who is respected by the group.

PRODUCING THE AGENDA FOR THE CO-DESIGN SESSION:

Agree or adjust the agenda.

WHEN IS IT NOT A LEARNING COMMUNITY OR WHEN IS A LEARNING COMMUNITY NOT APPROPRIATE?:

Occasionally, discussions about setting up a Learning Community will illuminate some organisational requirements or expectations which would not fit with the Learning Communities approach. Keep referring back to the principle that a Learning Community is a co-designed trusted space for peers to talk honestly about the judgements and uncertainties in their practice. It's okay to recommend other models if the discussion suggests a better fit, perhaps appraisal, mentoring, coaching or action learning.

PHASE 2:

THE CO-DESIGN PROCESS

The co-design process is important to ensure the group is 'owned' by the members, that it is 'ours'. It sets the scene and is the start of trust building. By the end of this phase, you will be able to produce an agenda for the first Learning Community.

BEFORE THE DAY

The sponsor's role is to coordinate the arrangements for co-design session, making sure a date, time and venue is set and to ensure that the 'role model' has an agreed brief about how they will present their practice. The sponsor will ensure that the new cohort are supported to attend and understand the Learning Community purpose and principles. Ensure, as facilitator, you are informed of the arrangements.

The facilitator will work with the first presenter as required for the participant to be ready to present their practice, using the presenter briefing notes. This may be a 1:1 meeting or by phone and email.

BEFORE THE MEETING

Arrive ahead of time to ensure the room is set up horseshoe or boardroom style with working audio-visual equipment.. This role will become the group's responsibility for subsequent sessions.

LEARNING COMMUNITY DESIGN SESSION AGENDA

Time	Item
START 00.00	**INTRODUCTIONS – WHO IS IN THE ROOM?**
10m	**WHAT IS A LEARNING COMMUNITY?**
20m	**GROUND RULES** What will enable us to talk honestly and authentically with one another?
35m	**PRESENTATION BY X**
55m	**DISCUSSION**
1h 30	**BREAK**
1h 40	**DESIGN QUESTIONS** Who should be in the room? When and where will you meet? How will the sessions be facilitated? What ground rules will apply for each session? How will you present your practice to each other? What is the brief for presenters? How many presentations? How will you record and capture learning? How will you reflect on their learning between sessions? Who will you report your findings to?
2h 30	**HOW WAS THAT FOR YOU?**
2h 45	**DATE AND PRESENTERS FOR NEXT TIME AND FINISH**

LEARNING COMMUNITY DESIGN SESSION AGENDA - FACILITATOR'S DETAIL

TIME	AGENDA POINT	FACILITATOR RESOURCES	NOTES
START 00.00	Introductions	Flipchart 1 Facilitator's role Flipchart 2 Name Area of practice	Introduce self, role and experience – tell the group how you will be running the first session today (noting this will be shaped by the group in the design part), what your role is/how you will be managing contributions e.g. ask people to raise hand if they want to speak Use round robin. Ask members to briefly introduce themselves in one or two sentences
10m	What is a Learning Community?	Verbal with optional slide deck	Outline the Learning Communities philosophy. Include a note about how this group came about
20m	Ground rules	Flipchart and pens	Ask the group "What will enable us to talk honestly and authentically with one another?" Capture responses on flipchart. Use round robin if reluctant contributions (see notes) Seek volunteer to be the groundrules flipchart monitor to take flipchart at the end and bring it to each meeting
35m	Presentation by X	Introduce presenter	Signal time Manage interruptions
55m	Discussion		Thank presenter Signal discussion period and facilitate Manage time Summarise including actions/owners and ask how the group want to take relevant items out the room. Refer back to ground rules.
1h 30	BREAK		

3. LEARNING COMMUNITY DEVELOPMENT

TIME	AGENDA POINT	FACILITATOR RESOURCES	NOTES
1h 40	**Design questions:** Who should be in the room? When and where will you meet? How will the sessions be facilitated? Do you want someone to chair? (i.e. do people need to take turns to speak, with the order for speaking kept by the Chair? Or can people manage their own conversation? What ground rules will apply for each session? How will you present your practice to each other? What is the brief for presenters? Use the brief you developed with the role model as the starting point for this conversation. How will you coordinate meeting arrangements? How many presentations? How will you record and capture learning? How will you reflect on their learning between sessions? Who will you report your findings to?	**Flipchart or slide with list of questions**	Offer each question in turn\n\nFacilitate discussion\n\nSummarise for agreement purposes\n\nNOTE: The facilitator writes up the decisions made by the group and asks the group how/who they want to receive the notes.\n\nNote: the loud people will often say that they can manage their own conversation, but this may result in a situation where extrovert voices dominate.
2h 30	**How was that for you?**		Ask participants to give one or two sentences about their thoughts and feelings on the session with suggestions for how sessions can be improved. Use round robin
2h 45	**Date and presenters for next time**		Agreed by the group.\n\nAgree who will make meeting arrangements – room, date, time, notices
2h 55	**Finish**		Thank people for participation

SAMPLE BRIEF FOR PRESENTERS

At each session, there will be presentations from one or two Learning Community members. The purpose is to present your practice to your peers so that they can understand the detail of the complex decisions and judgements that you make, and can help and support you to improve your judgement-making. To do this, each presenter should describe an issue that is challenging for them, focussing on their practice within that context. They will do this by:

- Telling a story/stories which illustrate the issue, and their experiences of it

- Describe their own practice – what have they done, and what decisions/ judgements they made – reveal the detail of your practice to others

- Talk about any uncertainties/doubts you feel in respect of your practice and the decisions you made

- Ask questions of the group which help you reflect on your practice and your decisions/judgements

- Consider how to use data in your presentation – what sources are available readily or is there any information you need to allow for gathering in advance?

GROUNDRULES

An important part of creating the conditions for the sorts of conversations that Learning Communities have, is to create the groundrules.

It's up to each Learning Community how they 'hold' these rules after they have been initially coproduced and written onto a flipchart. Consider asking a volunteer from the group to capture the ground rules on to a flip chart – the facilitator can help summarise the discussion into what gets written down if needed. The ritual of writing the groundrules as a group makes them real and signifies this is a different type of space.

After the ground rules have been co-created, they can be held in an electronic document, a flip chart or a slide: each group will decide for itself. If you are an external facilitator, it's a good idea if it's NOT you. Really let the group 'own' their groundrules.

Inevitably, the flipchart paper will get lost of forgotten at a meeting or two – it doesn't matter. As facilitator, take a few minutes with the group to run up a new set – people will recall more or less what was there and certainly the most important ones.

Check in at the start of each meeting by asking if the group's groundrules are still more or less right – ask if there is anything anyone wants to add, delete or change.

The facilitator may prompt the group to consider topics or themes for their ground rules: the following notes may inform that design if the group gets stuck. Consider using a round robin method to ensure an even contribution.

TYPICAL GROUND RULES:

Respectful body language. Be aware of how our body language can communicate respect or disrespect. This includes eye rolling, crossed arms or turning away from speakers.

Listening. Active listening, avoid interruption or random subject changes. Remove distractions, feedback you have understood. Listen to what speakers and colleagues say, and how they say it.

Be kind and generous. Practise kindness to self and others, be generous and firm.

Confidentiality. Reach collective agreement about if, what and how discussions will be kept inside or shared outside the meetings.

Contribute. Share your practice and join in the discussions – your perspective is important. Create the conditions where helpful problem solving as well as disagreement and challenge are both constructive and welcome. Have courage.

Use of mobile devices.

PHRASES FOR PROMPTING FURTHER GROUND RULES

The design belongs to the group and it's important that groups shape them but the facilitator can guide the group to consider topics as long as the final inclusion belongs to them.

Allow the group to consider, shape or reject any themes by using facilitative language…

• I notice we haven't covered anything about (e.g. use of mobile phones), what does the group think about including something on that?

• Other Learning Communities have considered (e.g. confidentiality), is that important here?

• Let's review the list and think through if there is anything else for us to include.

• Are there any legal considerations we need to think about in the ground rules design?

• What else do we need to add to the ground rules?

PHASE 3:

FACILITATING THE LEARNING COMMUNITY

BEFORE THE DAY

A coordinator will have been identified from amongst the group members so the topic, agenda and meeting logistics will have been organised in advance of the Learning Community session. Make sure you know who to contact if you don't receive information on the arrangements, and at what point you will contact your sponsor if time lapses too much. We refer to flipcharts and pens, but this might mean smart tech for you and your group such as visualisers or smartboards.

BEFORE THE MEETING

Arrive ahead of time and check in with the Learning Community's nominated coordinator to ensure the room is set up horseshoe or boardroom style with working AV, flipchart and other required resources.

LEARNING COMMUNITY AGENDA

TIME	AGENDA POINT
START 00.00	**INTRODUCTIONS** – who is in the room?
5m	**REMINDER OF LEARNING COMMUNITIES' PHILOSOPHY AND GROUNDRULES**
10m	**WHAT HAS HAPPENED SINCE LAST TIME?** Reflections on previous session
20m	**PRESENTATION 1**
50m	**DISCUSSION**
1h 25m	**CAPTURING LEARNING AND REPORTING** What points from the discussion do you want to capture collectively? What would you like to report from the discussion, and to whom?
t1h 30m	**BREAK**
1h 40m	**PRESENTATION 2**
2h 10m	**DISCUSSION**
2h 45m	**CAPTURING LEARNING AND REPORTING** What points from the discussion do you want to capture collectively? What would you like to report from the discussion, and to whom?
2h 50m	**HOW WAS THAT FOR YOU?** How do you feel? How can we improve these sessions?
2h 55m	**DATE AND PRESENTER FOR NEXT SESSION**
3h	**CLOSE**

LEARNING COMMUNITY DESIGN SESSION AGENDA - FACILITATOR'S DETAIL

TIME	AGENDA POINT	FACILITATOR RESOURCES	NOTES
START 00.00	Introductions – who is in the room?	Flipchart 1 Facilitator's role Flipchart 2 Name Area of practice	Introduce self, role and experience – tell the group how you will be running the session today based on the design principles and what your role is/how you will be managing contributions, e.g. ask people to raise hand if they want to speak Use round robin. Ask members to briefly re-introduce themselves in one or two sentences
5m	Reminder of Learning Communities' philosophy and groundrules	Flipchart and pens	Summary of Learning Communities' philosophy Thank volunteer for looking after groundrules flip between meetings and seek agreement to do again. Ask the group to review the groundrules – are these still correct? What to add or delete to answer the question, "What will enable us to talk honestly and authentically with one another?" Capture responses on flipchart
10m	What has happened since last time? Reflections on previous session		Seek contribution – start with presenter/s from previous meeting. Use round robin if appropriate.
20m	Presentation 1		Signal time Manage interruptions
50m	Discussion		Thank presenter Signal discussion period and facilitate Manage time

TIME	AGENDA POINT	FACILITATOR RESOURCES	NOTES
1h 25m	**Capturing learning and reporting** What points from the discussion do you want to capture collectively? What would you like to report from the discussion, and to whom?		Summarise including actions/owners and how the group want to take relevant items out the room. Refer back to groundrules.
1h 30m	**Break**		
1h 40m	**Presentation 2**		Signal time Manage interruptions
2h 10m	**Discussion**		Thank presenter Signal discussion period and facilitate Manage time
2h 45m	**Capturing learning and reporting** What points from the discussion do you want to capture collectively? What would you like to report from the discussion, and to whom?		Summarise including actions/owners and how the group want to take relevant items out the room. Refer back to groundrules.
2h 50m	**How was that for you?** How do you feel? How can we improve these sessions?		Ask participants to give one or two sentences about their thoughts and feelings on the session with suggestions for how sessions can be improved. Round robin
2h 55m	**Date and presenters for next session**		Agreed by the group. Agree who will make meeting arrangements – room, date, time, notices
3h	**CLOSE**		Thank people for participation

3. LEARNING COMMUNITY DEVELOPMENT

FACILITATION SKILLS AND PRACTICE

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EVERYTHING in Learning Community facilitation is about creating that trusted space for conversations about how and why people make the judgements they do. To achieve this, some core facilitation skills, based on open dialogue principles, are needed.

THE FIVE PRINCIPLES OF OPEN DIALOGUE ARE:

Accepting **we all only ever partly know** and understand what is going on, so we need to **tolerate uncertainty** of other knowledge / understandings existing.

Knowledge and understanding is co-produced between people in our social networks, through dialogue with others (a social network perspective).

This **values everyone's unique point of view** on anything discussed which is difficult to understand.

A facilitator of an "Open Dialogue" session concentrates on **generating dialogue** between different points of view (rather than closing down the discussion to an agreed plan etc).

We **take responsibility** for our role within a social network (we may have access to resources and knowledge others do not).

SOME TIPS FOR LEARNING COMMUNITY MEMBERS

• Jot down questions as they occur to you – you may hear the answer during the segment or you'll be more prepared to ask it later

• Think about what you actually want to know and design your question toward that

• Avoid long introductory remarks

INITIAL ENGAGEMENT SKILLS

• Ice-breaker ideas – **round of introductions and introduce self.** Share appropriate experience to establish credibility

• Co-produce and refer back to **groundrules**

• Ensure **room is prepared** to be safe reflective space. Consider seating layout, temperature, volume of technology used, proximity to usual working space, access to refreshments

PARTICIPATION SKILLS

• **Enabling everyone to contribute to group**

• **Increase contribution of overly quiet / submissive participants.** Consider asking those not contributing verbally a direct "easy to answer" 'open' question, e.g. "what comes to mind, Tracy, when you think about these topics discussed?

• **Reducing input of overly dominant members,** e.g. validate their view and ask "what do other people think?" Ask the group whether they would like to speak via the facilitator i.e. the facilitator takes note of whose turn it is to speak. Anyone who wants to speak draws the attention of the facilitator, who adds their name to the list.

ONCE DISCUSSION STARTED:

• Remember your **role is to facilitate** discussion not to get everyone to agree with your view – so **stay in facilitator role.**

• **Relax** - you do **not need to have all the answers**. You only partly know what is going on at best!

• Accept **silence as okay** – people may just be thinking or reflecting before they share.

• **Be flexible** during the session – but within limits to keep everyone **on track** to overall goal or **purpose** through **good process.**

• Remember everyone else only ever **PARTLY knows** what is going on (an Open Dialogue value).

• **Validate** and value views shared – this does not mean you have to agree with all views expressed!

• You can **use people's own words** e.g. repeat key phrase and/or can point out alternative ways ('reframing') of seeing same issue, e.g. "Yes, you think they are paranoid, some people might call that "overly suspicious", what do other people think?"

• **Avoid imposing own views** - you are the facilitator– but in Open Dialogue approach, be willing to share part of how you see it (appropriately) and then get others views.

• Listening skills are vital – **listen, listen, listen** - really carefully, then check you have heard a point correctly.

• Consider meeting pace - a skill is to decide when to **move discussion on to a different point** , e.g. "I'm thinking now about another point we heard, X, and wondering what came to mind when you think about X?"

• **Invite alternative views** – remember as facilitator the goal is to **generate dialogue** between alternative viewpoints - not to get people to agree on one plan or one point of view.

• **Notice** the language being used – if the conversation moves from 'I' to 'they' in terms of practice and behaviours, it's a clue that there may have been a move away from talking authentically.

• **Role model reflective practice** yourself in the group, e.g. could say what comes into your mind when you hear two different views.

- Consider advising use of a **variety** of activities to allow for different learning styles, e.g. watch film, write notes, discuss in group etc.

- **Protect people** who are worried about being put down for sharing ideas – make it safe space to share different views.

- Be explicit that we are trying to **build up trust** and **create a safe space** for people to share and explore different points of view.

- **Deal with disruptive or over-dominating** people constructively but firmly - don't let them take over the group.

- It's the **judgement** of the facilitator about whether a conversation has slipped into the realm of gossip or moaning – use techniques to move the conversation on or reflect this to the group.

- Utilise the refreshment **break opportunity** if the group seem stuck, 'Let's take a tea break…'

- **Sum up** the session, noting the key issues discussed – check if people agree.

- **Ask people to sum up.** Try a round of "If you held in mind what we have discussed today, what is one thing you would do differently?"

- **Thank** people for their participation.

- Check time and date of next meeting and possibly topic. Consider advance preparation or homework – a film people link to watch beforehand.

- Hold in mind you are **taking people on a journey as facilitator** and journeying with them. You are interested in **the process** of the journey as well as **the destination** or goal, that is, getting people to reflect on practice and on self and others whilst keeping the group on track for **their goal** of learning more knowledge and skills around their practice.

SELF-CARE

- **Look after and care for yourself.** Facilitating groups can prompt thoughts and feelings for ourselves – so find someone to reflect with on how it went, process and evaluate how your facilitation went well and what you could do better to improve your skills. This could include group supervision for facilitators or joining the Learning Communities Facilitators' Network

- **Talk to someone appropriate** on a 1:1 if something difficult has stirred up your thoughts and feelings during the group to process thoughts and feelings appropriately and not get "stuck" in them

- Consider how to **evidence** difference being made

- Consider how to ask for **feedback** on your facilitation skills

- Focus on what is in your 'circle of control' rather than on what you cannot influence

- **Talk with other facilitators:** discuss skills and challenges of facilitating!

- Agree with your groups, at co-design stage, any outputs or feedback you want as a facilitator

WHERE DECISIONS NEED TO BE MADE

The facilitator may suggest one of the following tools for decision making if a group is unable to reach consensus or there is a sense that one or two people are dominating:

- **Consider** introducing pairwork – ask people to work in twos to put their top three suggestions each onto sticky notes. Apply 'must, should, could' to each until one suggestion per pair is agreed. Pairs then contribute their suggestion to a flip chart for the whole group to vote on.

- **What else?** Is there anything else people need to know in order to make a decision?

- **Use traffic light voting** – every member makes a red (least favourite) or green (favourite) mark against the list of issues and select the one with the most green votes.

- **Park the issue** – suggest the group comes back to the issue later with more information or a fresh perspective.

FACILITATORS:

- **Are well organised** and well prepared

- Have facilitator **experience** or the opportunity for **training**

- Are **acceptable** to and **respected** by group members

ASKING GOOD QUESTIONS

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THESE ARE USEFUL TYPES OF QUESTIONS:

- More information: What does it cost for…?
- Clarification: Can you help me understand…?
- Verification: What is the evidence for…?
- Implications: What would happen if…?
- Comparison: What is the difference between…?
- Outcomes: What will the results be if…?
- Trade-offs: What are the costs and benefits of…?

THESE ARE NOT REALLY QUESTIONS:

- Don't you think that…?
- Isn't it true that…?
- Wouldn't it be better to…?
- Isn't the reality…?
- Shouldn't we be…?

REVIEWING AND REFLECTING

Learning Communities are built on principles of reflection and learning. As faciltators, if we are to authentically hold a trusted space for people to reflect and share their judgements and uncertainties about their practise, then it's important to 'walk the talk'.

Two sorts of review and reflection are particularly relevant to the facilitator:

REFLECTING IN ACTION.
Within Learning Community sessions, notice the cues that indicate the principles and codesigned groundrules of Learning Communities are being adhered to. Utilise the facilitators' toolkit of skills and practice to bring participants back to these as required.

REFLECTING ON ACTION.
The Learning Community meeting structure allows for participants to review how the session has gone and members are invited to make contributions about how the meetings could be improved. How else, as a facilitator, will you request feedback from members of the Learning Communities you run? What does the Learning Community sponsor require in terms of feedback, impact statements or data? Will you seek feedback at the end of meetings and/or in between sessions? Consider any requirements you may need to fulfil from your sponsor, professional body or employing organisation. Agree this at the design session with your groups, or as required.

A wide range of tools are available to help you collect data and feedback to support review and reflection. Some examples include:

• Make a note of simple counts – how many people attend? How often does the group meet?

• Member interviews – what difference has being a member of this Learning Community made to you? Describe how the group is (or isn't) a safe space to share judgements and uncertainties.

• Use a digital tool like ThoughtCloud (see www.thoughtcloud.org.uk) to collect attitudinal and feedback data.

• Send participants a feedback form or 'quick question' email in between meetings, e.g. is attending the Learning Community a good use of your time? What would you like more of and less of?

An important principle here is that the data itself offers something to the wider learning conversation: beware reacting to data in isolation. Data doesn't direct action, it's the sense-making conversations about the data that are important.

One of the Learning Communities Network's aims is to support the practice of facilitators which includes sharing our experiences of using different tools and methods and grow this list of examples.

REFRESHING A LEARNING COMMUNITY

A more structured review may be planned in advance, or may be prompted by circumstances or instinct, but there may come a time when a refresh of a Learning Community would be helpful. This may be done by repeating the design workshop, perhaps in parallel with revisiting the set up questions with the sponsor (check with the group if possible). If the prompt is that people aren't attending, consider gathering data to understand why – this might inform the sponsor conversation and/or the design review. Ask members what would the group need to be like in order to come back.

4.

CAN YOU HAVE A VIRTUAL LEARNING COMMUNITY?

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The principles of set up, design, facilitation and review apply equally in the virtual space. Virtual spaces need to be designed by Learning Community members – how to create a safe virtual space in which peers can talk honestly about the judgements and uncertainties of our practice.

The virtual domain offers opportunities for Learning Community members to continue conversations in between face-to-face meetings. And where peers are geographically separated, online tools offer a means to meet as a Learning Community.

There are many platforms which offer file sharing, cloud storage and online forums. The collaborative nature of Learning Communities lends itself to functioning through this method. Using an online forum enables accessibility and streamlined communication within a group. Interacting in this way gives community members the opportunity to pose questions, receive replies and fosters open discussions without having to wait for the next face-to-face meeting.

Online forums via internal organisational intranets or through external platforms such as Google offer a solution to establishing this kind of interaction. However, there are limitations to both of these options.

Internal forums may perhaps be more secure and accessible during work hours – although peers may be in differing time zones - and come with bespoke IT support. Perceived limitations need to be explored and considered in the design phase and key questions might include all those for face-to-face Learning Communities with some additional dimensions:

• who is able to view forum content?

• who will act as an on-line facilitator? Is there a separate 'moderator' role?

• how are documents and discussions captured and reported out of the forum?

This type of forum can be tailored to a group's specific needs, working with the organisation's IT department. It has the advantage of being a closed group for a particular community, for example, within a specific organisation this could be used to discuss root cause analysis results. There are other advantages around the ease of set-up and access, those within the organisation should be able to login without any difficulty.

The main limitation with this internal forum is that it is internal. It is only accessed from within a specific organisation by their members of staff this isn't inclusive of a wider community.

External forums are also widely available. One example would be through the Google platform which offers a free Google Group application. This allows user to create their own groups and set the level of dissemination and interaction. Users are able to have a private group where members are invited to join. This may work well for some Learning Communities as it allows the group to self regulate who is or isn't a member.

Settings can be a little tricky to navigate however the recommendation is that the group be set-up as a 'collaborative inbox'. This allows the group to have an online forum where members can post topics and replies however there is a requirement to have Google Chrome installed on the computer or device being used to access this. Some public sector organisations block access to external sites. Individuals can request access to the specific platforms via an "access to online file storage" from (or something similar in your organisation). If this is not possible the collaborative inbox can be interacted with entirely using email. Members simply email the group email address, in turn this is sent to all the members of the group, who simply reply to the email. Once this gains momentum there is the possibility of exploring other collaborations through the use of the online document writing and sharing, such as Google docs and sheets. There are also online versions of MS Word and MS Excel, and the expertise of members – as well as the facilitator – will define how the virtual space evolves.

5.

TRAINING AS A LEARNING COMMUNITY FACILITATOR

5. TRAINING AS A LEARNING COMMUNITIES' FACILITATOR

TRAINING AS A LEARNING COMMUNITY FACILITATOR

The purpose of a Learning Community is to provide a trusted space where people can talk honestly about their judgements and uncertainties in order to collectively improve. The facilitator's role is to create and maintain the space for members. It requires an understanding of the philosophy underpinning the approach, knowledge of the process and skilled facilitation expertise.

A training programme to provide faciliators with the knowledge, skills and confidence to build and run Learning Communities is available.

CORE TRAINING APPROACH

Most Learning Communities training is delivered to groups of 8-12 participants in two half-day workshops, held a few weeks apart so that delegates can practice their new skills in between training events and bring experiences back to the second workshop to support a problem-based learning dimension.

Delegates come from a range of organisational types, sectors and settings. Some are new to Learning Communities and some have been participating for some time.

The training is based on adult learning principles and takes account of different learning styles. The training invites participants to problem solve and draw on their varied professional experiences. However, the course is designed to enable new practitioners to develop the skillsets too. The training delivery models Learning Communities' values.

WORKSHOP AIMS

At the first session, participants will:

• Get to know other people interested in Learning Communities, and have the opportunity to join a network of facilitators for mutual support and practice improvement

• Gain an understanding of the theory, philosophy, benefits and limitations behind the Learning Communities approach

• Explore the three steps to set up and run a Learning Community

• Achieve or refine the required facilitation skills

• Become familiar with a suite of tools and techniques for reflection and evaluation

• Discover the role of data in the Learning Community

• Find out the aims and arrangements for the second session

• Contribute to a wider understanding of the skills, knowledge and infrastructure needed to develop and run Learning Communities

5. TRAINING AS A LEARNING COMMUNITIES' FACILITATOR

WORKSHOP AIMS

At the second session, participants will:

• Connect with other participants and shared experiences since last time

• Re-visit the theory, philosophy, benefits and limitations behind Learning Communities

• Hear what happens in a Learning Community meeting and the sorts of topics discussed

• Explore the three steps with a focus on running and refreshing a Learning Community including facilitation skills, dealing with challenges and ensuring an even contribution

• Consider Learning Community reporting, evaluation and reflection tools

What preparation are delegates asked to do in advance?

For session one:

• Review programme aims and bring a 'wish' list to each session

• Bring something to make notes with such as a tablet or some paper and a pen

• Identify and bring a note of any up-coming meetings where an observer from the training cohort might be able to attend

• Bring ideas for Learning Communities that you might have in mind for future development – this is not essential if no specific plans

• Let organisers know of any specific access or dietary needs

For session two:

• Prepare a sentence to share what has happened since last time in any Learning Community experiences

• Bring some paper and a pen, and the Facilitator's Handbook

• Identify and bring a note of any up-coming meetings where an observer from the training cohort might be able to attend

• Bring ideas for any Communities that you might have in mind for future development – this is not essential if no specific plans

• Let organisers know of any specific access or dietary needs

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WHY DO WE EVALUATE THE TRAINING?

We want to know more about the skills, knowledge and infrastructure that are needed to successfully build and run Learning Communities, and about the wider role that Learning Communities can play in enabling collective improvement in complex environments.

FEEDBACK AND EVALUATION

We ask Learning Community and training participants to help us improve the programme at every stage, and that sometimes includes asking people to complete feedback surveys or be interviewed. Involvement is voluntary, so people may choose whether to participate or not. Information will be supplied if people are approached to take part. As a facilitator, if Learning Community members, facilitators or sponsors undertake extra review or evaluation activities beyond the regular session review, ensure participation and permission information is communicated to ensure transparency about the purpose and use.

6.

6.

THE LEARNING COMMUNITIES NETWORK

THE LEARNING COMMUNITIES NETWORK

People with an interest in the theory and practice of Learning Communities are invited to join the Learning Communities Network. The Network aims to bring facilitators and others together to share practice, experience and resources. Local Learning Communities for facilitator cohorts who have completed their training can network together in this space too.

As well as an online space and local meet-ups, it's hoped to arrange occasional seminar events to meet in person.

7.

7. READING AND RESOURCES

READING, REFERENCES AND RESOURCES

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YOUR NOTES:

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MORE ABOUT THE LEARNING COMMUNITIES FACILITATORS' PROGRAMME

Newcastle University, Newcastle upon Tyne NE1 7RU

https://www.ncl.ac.uk/kite/social-renewal/learning-communities/#about

http://www.learning-communities.org.uk

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REVIEW scheduled for 2021.

HANDBOOK AUTHORS

Louise Wilson & Toby Lowe
louise@brilliantconversations.co.uk
toby.lowe@northumbria.ac.uk
@NetworkLouise @LngCommunities @tobyjlowe

HANDBOOK CONTRIBUTORS

Jamie Calderwood (On-line Learning Communities)

Ray Middleton (facilitation skills) - www.Ladder4Life.com

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