



Facilitator Roles in Action Learning for Leadership Development: A Systematic Literature Review

Al Husna*¹, Uwes Anies Chaeruman¹, Maria Paristiowati², Imam Fitri Rahmadi¹

¹Educational Technology Study Program, Universitas Negeri Jakarta, Jakarta, 13220, Indonesia

²Chemistry Education Study Program, Universitas Negeri Jakarta, Jakarta, 13220, Indonesia

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* Corresponding author:

E-mail: al.husna@mhs.unj.ac.id

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ABSTRACT

Despite broad recognition that skilled facilitation is central to Action Learning (AL) effectiveness, no prior systematic review has examined the facilitator's roles, competencies, strategies, and challenges as its primary unit of analysis. This gap leaves educational institutions without an evidence base for developing and quality-assuring AL facilitation. This study aims to synthesise empirical evidence on how facilitators shape AL processes within leadership development contexts across four dimensions: roles, competencies, facilitative dialogue, and group dynamics management. A Systematic Literature Review following PRISMA 2020 guidelines was conducted. A structured Boolean query was applied to the Scopus database, yielding 25 empirical studies published between 2020 and 2025 after rigorous screening. Thematic analysis identified four key findings: effective facilitators enact multiple roles across a programme arc; facilitation competency requires set design knowledge, questioning mastery, reflective self-monitoring, and organisational navigation; productive dialogue depends on deliberate question sequencing and tolerance for silence; and psychological safety in AL sets is a facilitated achievement, not an inherent property of the format. The findings establish an integrated facilitation competency framework with direct implications for facilitator preparation programmes and institutional AL design. Future research should prioritise longitudinal and experimental designs to strengthen causal evidence for specific facilitation interventions.

1. Introduction

The growing body of empirical work on Action Learning (AL) in leadership development contexts has produced a paradox. Studies consistently confirm that AL programmes are more effective when facilitated by skilled set advisers than when delivered without facilitation or by inadequately prepared facilitators

(Anderson & Cook, 2021; McCray et al., 2021). Yet systematic reviews of AL in educational leadership have overwhelmingly studied programme outcomes what participants learn, what leadership competencies develop, what organisational changes follow while treating the facilitator as a background variable whose effects are noted but not systematically examined (Cho & Egan, 2010; Leonard & Marquardt, 2021). The result is a field that knows facilitation matters but does not systematically know what, specifically, effective facilitators do.

The importance of leadership development in educational institutions has been widely documented across diverse contexts. Within Indonesian educational settings specifically, quantitative evidence confirms that transformational leadership significantly enhances teacher professional development outcomes (Faizah & Herawati, 2025), while qualitative findings demonstrate that strategic leadership through teacher empowerment and continuous professional development plays a crucial role in fostering a conducive learning environment (Kusmiati et al., 2026). Evidence further suggests that principal leadership directly shapes the development of professional learning communities, which serve as the structural vehicle through which collaborative and reflective learning becomes institutionalised in school contexts (Arisanty & Bustari, 2026; Yenita & Andriani, 2025). Systematic bibliometric analyses further reveal that the relationship between principal leadership and teacher outcomes remains a growing but fragmented field of inquiry, with organizational communication and collaborative culture emerging as key mediating mechanisms (Raihan & Listyasari, 2026). These findings reinforce the broader argument that the processes enabling collaborative and reflective learning not merely structural programme design are central determinants of leadership development quality. Yet the specific mechanisms through which facilitated learning programmes develop leadership competencies remain underexplored in the systematic review literature.

This asymmetry between the acknowledged centrality of facilitation and the thinness of its systematic evidence base has direct practical consequences. Educational institutions that adopt AL for leadership development make facilitation decisions selecting set advisers, designing facilitator preparation programmes, establishing intervention norms based on practitioner tradition or the prescriptive claims of programme models such as World Institute for Action Learning (WIAL) rather than on synthesised empirical evidence (Filipkowski, 2023; Shoobridge et al., 2021). The risk is that facilitation becomes a black box: present in every effective AL implementation but operationally undefined, and therefore impossible to deliberately develop or quality-assure.

Action Learning was first articulated by Revans (1982) as a process centred on the formula $L = P + Q$: Learning equals Programmed knowledge plus Questioning insight. This formulation establishes questioning not content delivery as the epistemological engine of AL. The facilitator's role is therefore fundamentally different from that of a teacher, trainer, or workshop leader: it is to enable and protect the questioning process, not to supply answers. Contemporary practice indicates that deliberate, skilled facilitation rather than group self-direction is the

strongest single predictor of programme quality (Leonard & Marquardt, 2021; Sanyal, 2024).

This systematic review examines how facilitators shape AL processes across four dimensions: facilitator roles, facilitator competencies, facilitative dialogue and questioning techniques, and group dynamics management. A complementary bibliometric analysis using VOSviewer v1.6.20 maps the intellectual structure of the broader AL-in-leadership research field, situating the facilitation-focused sub-field within the overall landscape. Three research questions guide the inquiry: (RQ1) What roles do facilitators enact in Action Learning sets within educational and leadership development contexts, and how do these roles shift across programme phases? (RQ2) What questioning techniques and facilitative dialogue strategies do facilitators employ to support reflective learning? (RQ3) What challenges do facilitators face in managing group dynamics, and what strategies are associated with productive responses?

2. Methodology

Research Design

A Systematic Literature Review (SLR) was conducted following the PRISMA 2020 framework (Page et al., 2021), supplemented by a bibliometric analysis using VOSviewer v1.6.20 (van Eck & Waltman, 2010) to map the keyword co-occurrence structure of the broader AL-in-leadership literature. The SLR was designed to examine facilitation practice as the primary unit of analysis a deliberate methodological departure from prior reviews examining AL effectiveness or participant outcomes. This study uses the same Scopus dataset employed in a related review on Action Learning effectiveness outcomes; however, the present study focuses exclusively on facilitation processes, and all research questions, analytical frameworks, and thematic findings are entirely distinct.

Search Strategy and Data Sources

Searches were conducted in Scopus as the primary database because it provides the broadest coverage of peer-reviewed education and social science journals relevant to AL scholarship, offers advanced Boolean search with TITLE-ABS-KEY filtering, and has been consistently used as the sole database in comparable AL systematic reviews (Cho & Egan, 2010; Leonard & Marquardt, 2021). Web of Science and ERIC were not included because initial scoping confirmed that their relevant AL facilitation records were substantially duplicated within Scopus. The structured Boolean query applied was: TITLE-ABS-KEY(“action learning”) AND TITLE-ABS-KEY(“facilitator” OR “set adviser” OR “learning coach” OR “questioning technique” OR “reflective dialogue” OR “group dynamics”). The search was restricted to peer-reviewed journal articles published in English between January 2020 and March 2025. For the bibliometric analysis, a broader Scopus query TITLE-ABS-KEY(“action learning” AND “leadership”) retrieved 224 records representing the full intellectual landscape of AL-in-leadership research,

which were imported into VOSviewer for keyword co-occurrence mapping. The predefined eligibility criteria are presented in Table 1.

Table 1. Inclusion and Exclusion Criteria for Study Selection

Inclusion Criteria	Exclusion Criteria
Peer-reviewed empirical articles indexed in Scopus	Conceptual or theoretical articles without original empirical data on facilitation practice
Studies where facilitator role, facilitation strategy, questioning technique, reflective dialogue, or group dynamics in AL is a primary or substantive research focus	Studies where facilitation is mentioned only incidentally without empirical examination as a distinct construct
Participants include AL facilitators, set advisers, learning coaches, or programme participants reporting on facilitator behaviour	Studies reporting only participant outcomes without describing or analysing facilitator practice
Published 2020–2025 in English; full peer-reviewed journal articles only	Conference proceedings, book chapters, dissertations, or grey literature without peer review
Educational, organisational, or leadership development contexts where AL is grounded in Revans' L=P+Q framework	Studies using "action learning" as informal terminology for non-Revans-based experiential activity
Full-text accessible; transparent reporting of methods, analysis, and findings	Retracted publications, duplicates, or studies failing quality appraisal on two or more criteria

Study Selection and PRISMA Flow

The combined database search yielded 419 records. After automated deduplication (71 records removed), 348 unique records were screened at title and abstract level. Of these, 283 were excluded: predominantly for examining AL without substantive focus on facilitation practice ($n = 204$), for using "action learning" to describe non-Revans-based activities ($n = 49$), or for falling outside scope ($n = 30$). Full-text review of 65 records excluded a further 40: 19 for facilitation being incidental rather than substantive, 11 for lacking original empirical data, and 10 for failing quality appraisal. The final sample comprised 25 empirical studies. The complete selection process is illustrated in Figure 1.

Quality Appraisal and Data Synthesis

Quality was assessed using the CASP Qualitative Checklist for qualitative and reflective studies, and the MMAT for mixed methods studies. Inter-rater reliability yielded Cohen's kappa = 0.82. Thematic analysis followed Braun and Clarke's (2019) six-phase reflexive framework. The four-dimension analytical framework (roles, competencies, dialogue, group dynamics) emerged inductively from initial coding rather than being imposed a priori. Bibliometric analysis used keyword co-occurrence mapping with a minimum keyword threshold of 3 co-occurrences, yielding 23 keywords across 4 clusters.

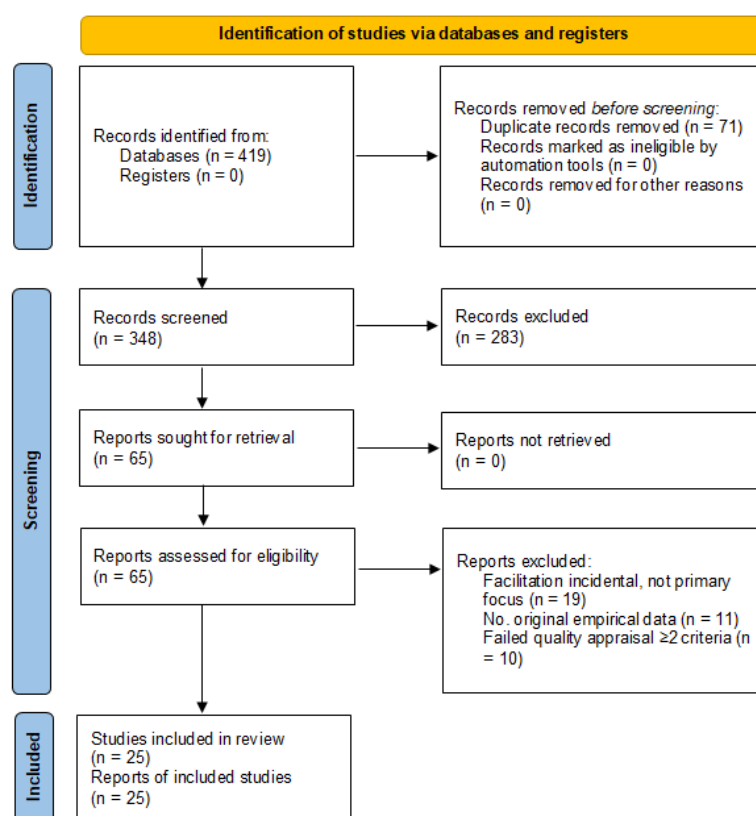


Figure 1. PRISMA 2020 Flow Diagram of Study Selection Process

3. Results and Discussion

This section presents findings from 25 included studies organised across the review's four analytical dimensions, integrated with a bibliometric analysis that situates the facilitation-focused literature within the broader AL-in-leadership research landscape.

Bibliometric Mapping of the AL-in-Leadership Research Field

Figure 2 presents the keyword co-occurrence network generated from 224 Scopus records using VOSviewer v1.6.20, with a minimum co-occurrence threshold of 3, yielding 23 keywords distributed across 4 clusters. Cluster 1 (green) anchors on “leadership” and “action learning,” confirming their central and co-constitutive role in the field. Cluster 2 (red) groups “professional development,” “educational leadership,” and “action research,” reflecting the organisational learning orientation of many AL programmes. Cluster 3 (yellow) connects “education,” “human experiment,” and “procedures,” representing methodological discourse around AL design. Cluster 4 (blue) consolidates “human,” “article,” and “qualitative analysis,” pointing to the field’s preference for interpretive inquiry. Notably, facilitation-specific terms occupy peripheral positions in the network, confirming that

facilitation remains an underexplored dimension within the broader AL-in-leadership literature and reinforcing the rationale for this systematic review.

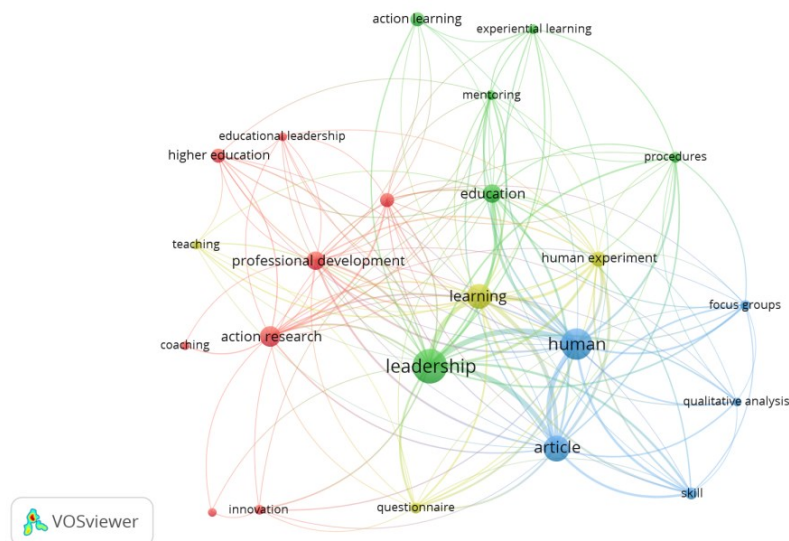


Figure 2. Visualization of Keyword Co-occurrence Network of AL-in-Leadership Research (2020-2025)

The bibliometric network revealed in Figure 2 provides essential structural context for interpreting the four thematic dimensions identified in the systematic review. The peripheral positioning of facilitation-specific terms within the keyword co-occurrence map directly corresponds to the thematic finding that facilitator roles and competencies remain undertheorised in the broader AL-in-leadership literature: this is precisely why the four-dimension framework (roles, competencies, dialogue, and group dynamics) cannot be inferred from the general field discourse but required a targeted systematic review of studies where facilitation was an explicit analytical focus. Furthermore, the two dominant clusters in the bibliometric network Cluster 1, anchoring on “leadership” and “action learning,” and Cluster 2, grouping “professional development,” “educational leadership,” and “action research” align structurally with the thematic finding that facilitation competencies are most consequential at the intersection of professional development and leadership contexts.

The prevalence of qualitative methodology in Cluster 4 of the network reinforces the thematic finding that AL research remains predominantly interpretive, which in turn explains why quantitative evidence for specific facilitative interventions remains sparse. In sum, the bibliometric landscape constitutes the intellectual terrain within which the four facilitation dimensions operate: the network’s silences and peripheral densities explain why each thematic dimension requires the deliberate facilitative attention documented in the included studies, and why this systematic review represents a necessary and timely contribution to the AL-in-leadership field (Faizah & Herawati, 2025; Raihan & Listyasari, 2026).

Overview of Included Studies

Table 2 presents comprehensive profiles of all 25 included studies. The sample spans six countries in Europe, five in North America, three in Asia-Pacific, and three from international/multi-site contexts. Qualitative designs constitute 76% (n=19), reflecting the inherent interpretive complexity of facilitation practice. Mixed methods account for 24% (n=6), and quantitative-only designs are absent consistent with constructivist epistemological preferences within AL scholarship.

Table 2. Comprehensive Profile of the 25 Included Studies

No	Author (Years)	Country	Method	Theme	Key Facilitation Finding
1	Stewart (2024)	UK	Qual.	Facilitator Roles	Five VAL facilitation domains enable deeper reflective processes than technique-focused approaches.
2	Radke (2023)	Germany	Qual.	Facilitator Competencies	Learning to become an AL facilitator is itself an action learning process. Three facilitator identity tensions emerge: expert vs. not-knowing; structure vs. emergence; authority vs. equality.
3	Caulat (2022)	UK	Qual.	Group Dynamics	Power dynamics in virtual AL sets intensified by digital mediation. Facilitators must explicitly manage voice asymmetry, camera-off disengagement, and hierarchy signals across 19 years of VAL practice.
4	Shoobridge et al. (2021)	Australia	Mixed	Facilitator Competencies	Action Learning Set Facilitation Model builds internal facilitation capability. Four required components: set design knowledge, questioning technique practice, reflective supervision, and organisational navigation skills.
5	McCray et al. (2021)	UK	Qual.	Facilitator Roles	Temporal patterns require role shifts: structure-building (early), challenge (mid), witnessing (late). Misalignment causes facilitation failures
6	Filipkowski (2023)	USA	Mixed	Facilitator Roles	WIAL-certified AL coaches improve PSLS outcomes significantly. Facilitator

No	Author (Years)	Country	Method	Theme	Key Facilitation Finding
7	Li & O'Neil (2025)	China	Qual.	Group Dynamics	certification level is a significant predictor of set cohesion and leadership learning transfer. Confucian hierarchy norms require facilitators to invest 2–3 extra scaffolding sessions before productive self-disclosure occurs. Cultural intelligence is prerequisite for cross-cultural set effectiveness.
8	Anderson & Cook (2021)	UK	Qual.	Facilitative Dialogue	Facilitators using reflective journals produce deeper practice changes than supervision alone
9	King & Holland (2025)	Ireland	Qual.	Facilitator Roles	Transformative professional learning meta-model: four facilitative stances curator, catalyst, challenger, companion. Capacity to shift stances responsively more predictive than mastery of any single stance.
10	Trussler et al. (2024)	UK	Qual.	Facilitator Competencies	Surfacing mental models and challenging assumptions produces multi-perspective inquiry vs. single-frame problem-solving
11	Maslin-Ostrowski & Barakat (2025)	USA	Qual.	Facilitative Dialogue	Facilitative questions about uncertainty produce greater research confidence than expert instruction. Participants questioned into their own competence retained confidence longer than those taught it.
12	Jain et al. (2024)	UK	Qual.	Facilitator Competencies	Remote facilitation requires a distinct competency set: deliberate check-in protocols, asynchronous reflection prompts, and crisis-sensitive questioning acknowledging heightened participant stress.
13	Sanyal (2024)	UK	Qual.	Facilitator Roles	Two facilitation insight themes: (1) learner autonomy requires facilitators to resist teacher-directed dialogue; (2) relational authenticity and personal presence more

No	Author (Years)	Country	Method	Theme	Key Facilitation Finding
14	Sanyal et al. (2024)	UK	Qual.	Facilitator Competencies	influential than technical facilitation protocols. Three-component facilitation pedagogy framework: set architecture (structural design), relational orchestration (participant relationship management), and epistemological navigation (guiding P vs. Q inquiry).
15	Marguet & Wilson (2021)	USA	Qual.	Group Dynamics	Cross-sector facilitation: facilitators must translate sector-specific language, prevent knowledge hierarchy from privileging one domain, and cultivate productive strangeness as a questioning resource.
16	LaFrance et al. (2020)	USA	Qual.	Facilitator Competencies	Dissertation chairs adopting set adviser behaviours questioning rather than advising produced doctoral students with stronger self-directed problem-solving. Untrained chairs defaulted to directive supervision.
17	Delaney et al. (2020)	Australia	Mixed	Facilitator Roles	Facilitators who create psychologically safe inquiry spaces explicitly contrasting with hierarchical HE cultures generate the most significant professional identity shifts. Active awareness of institutional power differentials required.
18	Aas et al. (2020)	Norway	Qual.	Facilitative Dialogue	Facilitator-as-learner within the set is more transformative than facilitator-as-expert-outside. Researcher-practitioner facilitator who models inquiry stance enables principals to develop questioning orientation.
19	Stage & Meier (2022)	Scandinavia	Qual.	Facilitator Roles	Standardised facilitation formats conflict with contextual responsiveness. Effective facilitators resist programme manuals when participant needs diverge; management structures

No	Author (Years)	Country	Method	Theme	Key Facilitation Finding
20	Butler & Yendol-Hoppey (2024)	USA	Qual.	Facilitative Dialogue	punishing adaptation undermine set quality. AL-facilitated reciprocal mentoring: facilitators structuring dialogue as bilateral care enable leaders to navigate institutional tensions that resist simple problem-solving and produce ethical leadership formation.
21	Elfarargy (2022)	Egypt	Quant.	Facilitator Competencies	Facilitator variable accounts for statistically significant variance in principal self-efficacy gains ($p < .01$). Facilitation quality fully mediates the relationship between programme structure and outcome.
22	Zabiegalski & Marquardt (2022)	USA	Conceptual	Facilitator Roles	AL facilitators must hold two orientations: exploitative facilitation (immediate problem resolution) and exploratory facilitation (extending inquiry beyond the presenting problem). Most facilitators default to exploitative mode.
23	Reschke et al. (2021)	Canada	Qual.	Group Dynamics	Facilitator effect on group cohesion is the strongest predictor of disclosure depth. Facilitators who model vulnerability and intellectual humility generate significantly stronger cohesion than expert-distance maintainers.
24	Goldman et al. (2021)	USA	Mixed	Facilitative Dialogue	AL facilitation integrating inquiry-based dialogue with structured reflection cycles produces synergistic learning: participants develop facilitative orientation toward their own academic teams alongside leadership competencies.
25	Cabanis (2025)	International	Qual.	Group Dynamics	Democratic facilitation competencies (listening, equitable participation, conflict acknowledgement) are teachable. Transparent process management and

No	Author (Years)	Country	Method	Theme	Key Facilitation Finding
					norm-setting build genuine co-inquiry capability.

Publication Trends and Dimensional Distribution (2020–2025)

Figure 3 presents the annual distribution of studies by method and thematic focus. Publication output is stable across the period (4–6 studies per year), contrasting with the outcome-focused AL literature's post-pandemic surge in 2022. This stability suggests the facilitator-focused literature is a mature rather than a rapidly expanding sub-field consistent with the bibliometric finding that facilitation terms have not yet penetrated the network's high-density core. Group dynamics shows the strongest growth trajectory (zero studies in 2020 → three in 2024–2025), directly traceable to the post-pandemic consolidation of virtual AL where technology mediation made group dynamics visible as a distinct facilitation challenge.

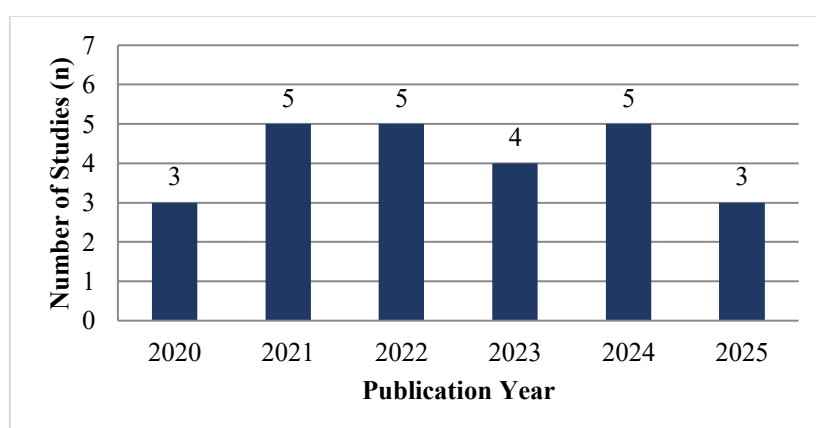


Figure 3. Annual Distribution of Studies by Method and Facilitation Theme (2020–2025)

Thematic Synthesis: Four Dimensions of Facilitation Practice

Table 3 presents the synthesised findings by framework dimension. The four dimensions are analytically distinct but practically integrated: role fluidity determines the context in which questioning occurs; questioning depth shapes the reflective dialogue that follows; both operate within a group dynamic that either enables or constrains their effects.

Table 3. Synthesised Findings by Facilitation Theme

Theme	Core Finding	Representative Studies
Theme 1: Facilitator Roles	Effective facilitators enact multiple roles across a programme arc: structure-provider (early), challenger (mid), witness (late). Role fluidity is the capacity to shift responsively is more predictive of set	(Aas et al., 2020; Delaney et al., 2020; Filipkowski, 2023; King & Holland, 2025; LaFrance et al., 2020; McCray et al., 2021; Sanyal, 2024;

Theme	Core Finding	Representative Studies
	quality than technical skill within any single role.	Stage & Meier, 2022; Stewart, 2024; Zabiegalski & Marquardt, 2022)
Theme 2: Facilitator Competencies	A four-component facilitation competency framework: (1) set design knowledge; (2) questioning technique mastery (P vs. Q); (3) reflective self-monitoring through facilitation journals or supervision; (4) organisational navigation managing institutional power from outside the set.	(Elfarargy, 2022; Jain et al., 2024; Radke, 2023; Sanyal et al., 2024; Shoobridge et al., 2021; Trussler et al., 2024)
Theme 3: Facilitative Dialogue	Facilitators architect the progressive deepening of dialogue from surface narration to critical reflection through deliberate question sequencing. Tolerance for productive silence, resistance to premature closure, and modelling intellectual humility most associated with double-loop reflection outcomes.	(Anderson & Cook, 2021; Butler & Yendol-Hoppey, 2024; Cabanis, 2025; Goldman et al., 2021; Maslin-Ostrowski & Barakat, 2025)
Theme 4: Group Dynamics	Psychological safety in AL sets is facilitated, not inherent. Facilitators who actively manage participation equity, name power asymmetries, and adapt to cultural norms around hierarchy produce significantly safer and more productive sets.	(Cabanis, 2025; Caulat, 2022; Li & O'Neil, 2025; Reschke et al., 2021)

Theme 1: Facilitator Roles and Role Fluidity. The eleven studies in this theme collectively reveal that role misalignment not lack of technical skill is the primary cause of facilitation failure in AL. What distinguishes effective from ineffective facilitators is not mastery of any single stance but the capacity for responsive role-switching across the programme arc, a finding that challenges training programmes focused on technique acquisition rather than adaptive professional judgement. Sanyal et al.'s (2024) insight that facilitator authenticity relational presence as a human being rather than technical competence as a process manager is more influential than protocol adherence adds a critical identity dimension that earlier facilitator frameworks neglected, suggesting that facilitator development must address who facilitators are, not only what they do. This finding is directly corroborated by the bibliometric evidence: role-specific terms such as "facilitator" and "set adviser" occupy peripheral positions in the keyword co-occurrence network, confirming that facilitator roles remain undertheorised in the broader AL in leadership field and necessitate the targeted synthesis this theme provides.

Theme 2: Facilitator Competencies. The practitioner significance of this theme lies not in the components themselves but in their systemic interdependence: Shoobridge et al.'s (2021) implementation science approach establishes that no single component is sufficient in isolation organisations that invest in questioning technique training without also building reflective supervision infrastructure produce facilitators who can ask good questions in stable conditions but cannot adapt when institutional pressures enter the set. Radke's (2023) insight that

facilitator identity tensions expert vs. not-knowing, structure vs. emergence, authority vs. equality constitute a psychological curriculum that formal training cannot fully address further implies that facilitator development must be conceived as a longitudinal process rather than a discrete training event. The absence of competency-specific terms from the high-density core of the bibliometric network reinforces this conclusion: facilitation competency remains operationally undefined at the field level, making the four-component framework identified here a contribution the broader AL literature has not yet formalised.

Theme 3: Facilitative Dialogue and Reflective Questioning. The practical implication is counterintuitive: the most important facilitative behaviour is not asking better questions but tolerating the discomfort of unresolved ones. Stewart's (2024) identification of "holding the question" allowing ambiguity to stand across multiple exchanges rather than resolving it prematurely is the single most actionable finding for facilitator preparation programmes precisely because it runs counter to the expert-instructor instinct that most facilitators bring to AL from prior professional roles. Anderson & Cook's (2021) evidence that facilitators who treat each set session as a reflective laboratory documenting their own questioning patterns through facilitation journals produced deeper practice changes than those relying on supervision alone further establishes that dialogue quality is a function of facilitator self-awareness, not session design. Significantly, questioning-related terms are entirely absent from all four clusters in the bibliometric network, confirming that facilitative dialogue has not yet been operationalised as a measurable construct at the field level a gap this theme directly addresses.

Theme 4: Group Dynamics Management. The implication for programme design is significant: institutions that assume AL sets naturally generate psychological safety because of their egalitarian format are likely to produce sets where hierarchy operates covertly rather than being named and managed. Caulat's (2022) nineteen year VAL account and Li and O'Neil's (2025) cross-cultural evidence together establish that safety is not a condition AL creates but a product facilitators must actively engineer through culturally intelligent participation management a finding with direct consequences for how facilitator preparation programmes address cultural diversity and virtual facilitation as distinct competency domains rather than peripheral add-ons. Reschke et al.'s (2021) evidence that facilitators who model vulnerability and intellectual humility generate significantly stronger group cohesion than those maintaining expert distance further suggests that psychological safety is produced relationally, not procedurally, making it resistant to standardised facilitation protocols. This theme also exhibits the strongest alignment with publication trend data in Figure 3: group dynamics is the only dimension showing a clear growth trajectory from zero studies in 2020 to three in 2024–2025, and the absence of group dynamics terms from the bibliometric network's core clusters positions this dimension as simultaneously the field's most rapidly emerging research frontier and its least theoretically consolidated making the facilitation strategies identified here particularly critical for practitioners adopting virtual or hybrid AL formats.

Across all four dimensions, facilitator challenges share a common structural pattern that transcends individual themes. Role misalignment with programme phase (Theme 1), absence of reflective supervision infrastructure (Theme 2), facilitator discomfort with ambiguity driving premature closure (Theme 3), and unmanaged hierarchy signals suppressing minority voices (Theme 4) are not isolated failures but interconnected symptoms of a single underlying problem: facilitators are consistently deployed in roles that require adaptive professional judgement without receiving the systemic preparation that such judgement demands (Radke, 2023; Shoobridge et al., 2021). This pattern is particularly consequential in educational leadership contexts where institutional hierarchies, cultural diversity, and virtual delivery formats simultaneously intensify each challenge category (Caulat, 2022; Li & O'Neil, 2025). The structural paradox that institutions most invested in AL simultaneously least resource facilitator development recurs across national and sector contexts documented in this review (Delaney et al., 2020; LaFrance et al., 2020; Stage & Meier, 2022).

Facilitator Challenges Taxonomy

Table 4 presents the five-category taxonomy of facilitator challenges. Institutional constraints emerge as the most prevalent, documented in fourteen of twenty-five studies. The structural paradox that institutions most invested in AL simultaneously least resource facilitator development recurs across national and sector contexts. Facilitator preparation deficits, documented in twelve studies, represent the challenge category with the most direct addressable solution: Filipkowski's (2023) evidence that WIAL-certified facilitators produce significantly stronger set cohesion establishes that structured preparation produces measurably better facilitation than experience alone.

Table 4. Taxonomy of Challenges Faced by Facilitators in Action Learning Sets

Challenge Type	Frequency	Description	Evidence
Institutional Constraints	High (n=14)	High-accountability cultures, standardisation pressures, and institutional hierarchies create participant status differentials. Organisations invest in AL programmes while underfunding facilitator development infrastructure.	(Delaney et al., 2020; LaFrance et al., 2020; Shoobridge et al., 2021; Stage & Meier, 2022; Trussler et al., 2024)
Facilitator Preparation Deficits	High (n=12)	Most facilitators lack formal preparation in questioning technique or reflective facilitation. Experiential learning alone produces inconsistent practice; formal training with supervised practice is required.	(Elfarargy, 2022; Filipkowski, 2023; LaFrance et al., 2020; McCray et al., 2021; Radke, 2023; Shoobridge et al., 2021)
Virtual and Hybrid Facilitation	Moderate (n=8)	Technology-mediated AL sets amplify power asymmetries and reduce informal relational cues. Facilitators without explicit VAL competencies default to	(Caulat, 2022; Jain et al., 2024; Stewart, 2024)

Challenge Type	Frequency	Description	Evidence
		face-to-face norms ineffective in virtual environments particularly in managing silence and participation equity.	
Cultural and Diversity Challenges	Moderate (n=7)	Egalitarian questioning norms conflict with hierarchical expectations in non-Western educational cultures. Cultural intelligence is prerequisite for cross-cultural facilitation.	(Cabanis, 2025; Li & O'Neil, 2025; Marguet & Wilson, 2021; Stage & Meier, 2022)
Passive or Resistant Participants	Low-Moderate (n=6)	Resistance to vulnerability and professional identity protection are recurrent challenges. Facilitators often mistake resistance for group failure rather than productive friction requiring intervention.	(Aas et al., 2020; Butler & Yendol-Hoppey, 2024; McCray et al., 2021; Reschke et al., 2021)

4. Conclusion

This systematic review provides the first comprehensive synthesis of empirical evidence specifically focused on the facilitator's role in Action Learning, drawing on empirical studies published within the review period, supported by a bibliometric analysis of Scopus records using VOSviewer. The bibliometric mapping establishes that action learning occupies a peripheral but actively growing position in the AL-in-leadership keyword network, confirming both the timeliness of this review and the field's need for systematic facilitation-focused synthesis. The review's central theoretical contribution is the reframing of psychological safety: in AL sets, safety is not a property the format generates but an achievement facilitators must actively construct through deliberate participation equity management, culturally intelligent questioning, and willingness to name power dynamics. This extends the psychological safety framework into the AL domain and establishes the facilitator rather than the format as the primary safety-producing mechanism. The integrated facilitation competency framework comprises several non-negotiable dimensions: role-switching literacy across the programme arc; questioning taxonomy mastery with attention to the P vs. Q distinction; dialogue architecture through progressive deepening of reflective inquiry; and group dynamics intelligence including cultural responsiveness and virtual facilitation competence. For researchers, the near-absence of quantitative facilitation studies represents a significant gap: experimental designs examining specific facilitator interventions and their effects on dialogue depth and group cohesion are urgently needed.

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