Learning Circles for Advanced Professional Development in Evaluation: Two Experiences

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Presentation aim

- Report purpose, process and outcomes of a trial implementation of an alternative learning model for advanced professional development in evaluation

Kishchuk, Gauthier, Roy, Borys & Radford, 2013
Outline

- Origins of this experiment
- Learning circles and other forms of self-directed adult learning: background
- Learning circle model adopted
- Content covered, learning achieved
- Outcomes: what we’ve learned about learning in learning circles

Kishchuk, Gauthier, Roy, Borys & Radford, 2013
Origins of this experiment

- Canadian evaluators dissatisfied with opportunities for advanced training
    - 71% of evaluation producers would like additional training in evaluation
    - 60% cite lack of availability of training on advanced topics as a barrier
    - Preferred forms of learning:
      - Professional development workshops: 69%
      - Conferences: 47%
      - Mentoring or learning from others: 36%
      - Self-directed learning: 34%

- Context of the competency maintenance requirement for the CE designation
- Suggested a need to diversify levels and forms of professional development available

Kishchuk, Gauthier, Roy, Borys & Radford, 2013
Learning Circles and other forms of self-directed adult learning

- Many models of self-directed learning, with two main streams:
  - Self-improvement: e.g.
    - Adult education
    - Chautauquas
    - University of the Streets, Open University
    - Journal Clubs
    - Virtual learning groups
  - Activist, change-oriented: e.g.
    - Popular education (Freire)
    - Study circles – citizen participation
    - Quality circles - work improvement groups

Kishchuk, Gauthier, Roy, Borys & Radford, 2013
Learning Circles and other forms of self-directed adult learning

- **Definition: learning circles**
  - bring together experienced practitioners
  - in structured collaborative cycles of learning activities
  - about topics of mutual interest
  - drawing on external experts as required

- **Some best practices identified from the literature**
  - (in the midst of a lot of variations)
  - regular, anticipated meetings
  - relatively small groups (5-7 mentioned)
  - appropriate logistics (timing, duration, pace, etc.)
  - a leader for each discussion
  - summarizing findings
  - ensure common objective among members (e.g. support the learning of all members)
  - trust within the circle, diversity, cohesion

Kishchuk, Gauthier, Roy, Borys & Radford, 2013
Model adopted

- **Structure and organization of cycles**
  - Initial list of topics put together and updated informally
  - Cycle of 6 weeks
  - Revolving leadership: topic selection, identification of readings, leading discussion, leading evaluation
  - Three to six articles on topic
  - 45-minute teleconference: 12:15 – 1:00, call in at 12:00 (for lateness and chitchat)
  - Possibility of experts
  - Written post-event evaluation on expectations and experience
  - Dropbox shared access site for documents and notes

Kishchuk, Gauthier, Roy, Borys & Radford, 2013
Model adopted

- **Preparation**
  - Leader sends out study questions with readings, at least 4 weeks ahead of session
  - Each member studies the material and prepares own answers

- **Actual session**
  - Leader presents readings briefly, addresses questions
  - Discussion on questions, implications for practice, wrap-up
  - Follow-up assessment by e-mail

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Model adopted

- Underlying principles
  - Address a need for advanced training
  - Feasibility for busy people
  - Mutual responsibility for each others' learning
  - Enough homogeneity to share interest (e.g. evaluation culture, seniority)
  - Enough diversity to avoid group-think (e.g. career context, experience, education)
  - Mutual trust: an absolute prerequisite (e.g. competitive issues)

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Content covered, learning achieved

- **Eight cycles to date**
  - Learning circles
  - Contribution analysis
  - Bibliometrics
  - Value for money evaluation
  - Realist evaluation
  - Ethical systems in evaluation
  - Systems thinking in evaluation
  - Emergent evaluation design

- **Based on list of 23 topics**
  - Based on suggestions from LC members
  - Spreadsheet used as selection making tool (LC members scored level of interest on topics on list)
  - Most selected because at least one LC member felt a knowledge gap - could realistically expect that at least one member would learn something

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Content covered, learning achieved

- So did we learn?

- Depended on where the LC member started from
  - All admit learning at least something from each session
  - Four broad categories of learners identified

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Content covered, learning achieved

- **High learners:**
  - Those who thought they did not know about the topic and who agree that they did learn
    - Now have an opinion about it,
    - Know more about what knows/doesn’t know
    - Can express views about it, could manage a project involving it, etc.
    - But probably did not acquire practical skills because did not involve an actual practice

- **Comforted learners:**
  - Those who thought that did not know anything and realized that they knew more than they thought through their own personal experience/knowledge.
    - Provided a sense of comfort about their state of knowledge in general, and that they could talk about the topic with a certain level of confidence.
    - Discussion is important, especially when they realize that they were not the only ones to have that feeling.

- **Refreshed-knowledge learners:**
  - Those who thought they knew about something, and found the experience a good refresher.
    - Learning circle work forced the catch-up with the literature, adding confidence.
    - Discussions also added value added by providing different views on a topic.

- **Disgruntled or non-learners:**
  - (Possible, but not admitted to!) Those who learned nothing or very little from a session and expressed dissatisfaction with it.

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## Content covered, learning achieved

<table>
<thead>
<tr>
<th></th>
<th>1: Learning circles</th>
<th>2: Contribution analysis</th>
<th>3: Bibliometrics</th>
<th>4: Value for money</th>
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<tbody>
<tr>
<td>Participant A</td>
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<td>Comforted</td>
<td>High</td>
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<tr>
<td>Participant C</td>
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<tr>
<td>Participant D</td>
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<td>High</td>
<td>Comforted</td>
<td>Comforted</td>
<td>Refreshed</td>
</tr>
</tbody>
</table>

- Balancing learning results among all members is important.

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• Was this experiment successful for advanced professional development? YES
  ○ Advantages over other forms
    • Easy/accessible, low-cost, flexible
    • Shared responsibility
    • Greater time investment than just reading:
      ○ Each spent 2-4 hours preparing for each cycle, plus more time for leader
      ○ A luxury rarely self-afforded
    • More interactive than a webinar or seminar
      ○ Access to a wealth of examples from others’ experiences
    • Professionally stimulating, over and above new content

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Outcomes

- Making the “someday” pile the “today” pile
  - With a busy evaluation practice, tend to only read what is necessary, when it is necessary
  - With the learning circle, have a systematic process for working through professional literature (before it is “necessary”)
- Impacts on evaluation practice
  - e.g., recognition that we should be paying more attention to cost questions
- Immediate relief of guilt plus sense of satisfaction from reducing the “someday” list
- Increased confidence in evaluation practice
  - Additional models or techniques to incorporate into practice
  - But also, validation that our practices are not as vulnerable as we may have thought because we hadn’t kept up with our reading
  - Plus, readings take us up to a point of knowing enough about particular topics to be able to identify where we might want or need to learn more

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Disadvantages and caveats

- Our group has long history of successful collaboration: would it work as well among people who don’t know each other as well?
- Homogeneity is a potential concern; it facilitates the process but perhaps limits the discussion
- 2-3-4 articles is not exhaustive: choice is important
- Small group could lead to issues if schedules are difficult and people cancel
  - Hasn’t been an issue for our circle though (in fact, might be a motivating factor)
Where to next?

- We intend to continue
  - Documenting our process so we continue to learn about it
  - Practice note for CJPE
- Acceptability of learning model for CE credits?
- Expansion to other "cells" (other evaluator learning circles), other domains (other content areas such as health, environment, federal government, etc.)?
- Sharing of reading lists to facilitate broader professional development
  - Development of a Web site

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A second experience: background

- **Kathryn Radford**
  - Graduate Certificate in Program Evaluation, University of Ottawa, August 2012
  - Audit and Evaluation, Industry Canada

- **Learning Circles**
  - CES Annual Conference 2012 Halifax, group dinner
  - Unable to attend session, asked for PPT
  - Made a commitment to Benoit and Shelley to try to put together a group

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A second experience: putting it together

- 3 colleagues from Graduate Certificate Program
- Had worked together before
  - Had won the 2010 CES Student Case Competition
- Sent them Learning Circle PowerPoint
- Almost instant buy-in
- First meeting a couple of weeks later
A second experience: how we work

- **Preparation**
  - Leader sends out readings about 2 weeks in advance
  - All members read and prepare a short reflection that could include:
    - questions/comments that arise
    - our own experience with topic or anecdotes heard from others
  - Quotations from the readings that could generate discussion
  - Send reflections to all members, by morning of session, earlier if possible

- **Actual Session**
  - Short round table
  - 45 minute discussion, using reflections to feed discussion
  - Close discussion with synopsis of learning outcomes
  - Confirm next topic, leader and date for session

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## A second experience: results

<table>
<thead>
<tr>
<th>Participant</th>
<th>Session 1: Theory-Based Evaluation / Contribution Analysis</th>
<th>Session 2: Performance Measurement</th>
<th>Session 3: Cost-Efficiency</th>
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A second experience: impressions

- Members are very positive
  - **Member 1**
    - Immediately appealing idea.
    - Felt frustrated by not being able to keep abreast.
    - Lack of time at work and of motivation at home.
  - **Member 2**
    - Learned new things and refreshed.
    - Newly published documents and literature.
    - Sharing ideas with colleagues.
    - Writing task very useful.
  - **Member 3**
    - Time investment not onerous.
    - Included as part of my formal annual learning plan.

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A second experience: points to ponder

- **Challenges**
  - Some articles not easily available
  - Need access to teleconference services
  - Scheduling

- **Improvements?**
  - Satisfied with current process but interested in hearing about other groups


