RESEARCH AND PRACTICE NOTE

LEARNING CIRCLES FOR ADVANCED PROFESSIONAL DEVELOPMENT IN EVALUATION

Natalie Kishchuk
Natalie Kishchuk Evaluation and Research Inc.
Montreal, Québec

Benoît Gauthier
Circum Network Inc.
Gatineau, Québec

Simon N. Roy
Goss Gilroy Inc.
Ottawa, Ontario

Shelley Borys
Public Health Agency of Canada and Health Canada
Ottawa, Ontario

Abstract: Studies of Canadian evaluators have consistently shown them to be dissatisfied with opportunities for advanced training, suggesting a need to diversify the forms of professional development available to seasoned evaluators. This article reports on a trial implementation of an alternative learning model: learning circles for advanced professional development in evaluation. This model is grounded in approaches drawn from self-directed learning, self-improvement movements, adult and popular education, quality improvement, and professional journal clubs. Learning circles bring together experienced practitioners in structured collaborative learning cycles about topics of mutual interest. We experimented with an evaluation learning circle over several cycles, and report on what we learned about purpose, process, and outcomes for professional development. We hope that this model will be of interest to other evaluators, especially in the context of the competency maintenance requirements of the CE designation.

Résumé :   À travers diverses études, les évaluateurs de programme canadiens ont indiqué leur insatisfaction par rapport à l'accès au perfectionnement de niveau avancé, ce qui suggère un besoin de

Corresponding author: Natalie Kishchuk, Natalie Kishchuk Evaluation and Research Inc., 4360 St-Ambroise, Montreal, QC, Canada H4C 2C7; <nkishchuk@kishchuk.ca>

diversifier les modes de perfectionnement disponibles aux éva-
luateurs expérimentés. Cet article décrit l'expérimentation d'un
modèle alternatif : le cercle d'apprentissage visant le perfection-
nement avancé en évaluation de programmes. Ce modèle se base
sur plusieurs approches : l'auto-apprentissage, les mouvements
d'auto-amélioration, l'éducation aux adultes, l'éducation popu-
laire, l'amélioration de la qualité et les clubs de lecture profes-
sionnels. Les cercles d'apprentissage amènent de petits groupes
d'évaluateurs expérimentés à participer à des cycles d'apprentis-
sage collaboratif structuré sur des sujets d'intérêt mutuel. Nous
avons mis ce mode d'apprentissage à l'essai sur plusieurs cycles
et nous partageons ici ce que nous avons appris sur les objectifs,
les processus, et les résultats en termes de développement pro-
fessionnel. Nous espérons que ce modèle intéressera d'autres
évaluateurs, notamment dans le contexte de l'exigence de la SCÉ
pour le maintien du titre professionnel d'évaluateur accrédité.

INTRODUCTION

Professional bodies, including the Canadian Evaluation
Society (CES), consider access to relevant and useful professional de-
velopment to be essential for developing members' competencies and
advancing the field as a whole. Indeed, CES requires credentialed
evaluators to engage in 40 hours of professional development every
three years (http://evaluationcanada.ca/en/5/6). However, studies
have shown that many evaluators are dissatisfied with the opportu-
nities available for advanced training. For example, a 2010 survey
(Gauthier, Roy, Borys, & Kishchuk, 2010) found that only two thirds
(66%) of Canadian evaluators were satisfied with their opportuni-
ties for professional development. In a previous survey, Gauthier,
Borys, Kishchuk, and Roy (2006) also found that while most Cana-
dian evaluators (69%) stated they preferred traditional modes of
professional development, about one third stated preferences for
alternatives, such as mentoring or learning from others (36%) and
self-directed learning (34%). This Research and Practice Note reports
on an experiment with a form of small-group learning for advanced
professional development in evaluation: learning circles.

In a scan of the relevant literature on self-directed adult learning,
we identified two main streams. A change-oriented stream includes
forms of popular education such as Freire's critical pedagogy as well
as study circles that aim to increase citizen participation and solve
community problems (e.g., Bingham, Nabatchi, & O'Leary, 2005;
Konisky & Beierle, 2001; Meisterheim, Cretney, & Cretney, 2011) and

quality circles/Kaizen teams (Hutchins, 1985), in which workers meet in self-directed groups to improve efficiency, safety, or productivity. Our approach was more closely aligned with a self-improvement stream grounded in adult education principles: voluntary participation, mutual respect, collaborative spirit, critical reflection, and self-direction (Brookfield, 1986). It drew on models such as Chautauquas (Scott, 2005), University of the Streets Café (Concordia University, School of Extended Learning, 2012), virtual learning groups (Mc-Fadzean & McKenzie, 2001), and, most particularly, journal clubs (Deenadayalan, Grimmer-Somers, Prior, & Kumar, 2008). Our aim was to develop a mode of advanced professional development that could be self-organizing, responsive to specific learning needs, and more accessible than workshops or conferences. Unlike other experiments with learning circles in evaluation, our approach was not aimed at developing clients' (Cohen, 2006) or organizations' (Torres & Preskill, 2001) evaluation capacity, but did share the emphasis of those experiments on juxtaposing "the study of theory with reflection on practice in the context of work-related experiences" (Cohen 2006, p. 86) and on participatory co-learning.

LEARNING CIRCLE MODEL ADOPTED

We defined our learning circle as "structured collaborative cycles of learning activities organized by experienced practitioners about topics of mutual interest where members are collectively responsible to support the learning of all." Drawing on reviews and guidance from Deenadayalan et al. (2008), McDougall and Beattie (1995), and Mc-Fadzean (2001), we considered the following factors in designing our operational model:

- size of the circle, which could range from as few as 3 or 4 to more than 100;
- presence, nature, and role of a circle leader;
- type of participation: physically in the same space, virtually, or mixed mode;
- use of experts to guide the group in the pursuit of their objectives;
- diversity of group membership sought by members, which could range from tight homogeneity to planned diversity;
- preparation expected of members before circle meetings, ranging from no preparation at all to compulsory attendance and reading;
- selection of readings, from imposed to group-selected;

- frequency of activities, which could be weekly, monthly, or otherwise;
- preparation time allotted to members, from days to weeks;
- timing of the meetings within the day;
- use of technology as a supportive tool;
- objectives sought, which could include preparation for examinations, the development of skills, the translation of knowledge into practice, the upgrading of knowledge, and so on; and
- indicators of success, such as level of attendance, the satisfaction derived by members, and degree of utilization of the learnings.

The model that this group implemented is as follows:

- The group comprises four members who have known each other for many years and are fairly homogeneous in terms of age, experience, and training. Located in three cities, their offices are too far apart to make in-person meetings practical.
- Members contribute regularly to a list of potential topics in which they have felt a knowledge gap.
- Each cycle is led by a member who volunteers to research the literature on a topic of particular interest to them and agreed to by the group.
- One-hour meetings, including 15 minutes for general conversation, are carried out by teleconference every six weeks.
- The meeting leader selects two to six articles and distributes them about four weeks before the meeting, along with two questions to structure the discussion. Reading materials (cleared of copyrights) and notes are deposited on a shared Internet storage space.
- Each session requires between three and six hours of reading (depending on whether one is the leader of that session).
- The meeting leader opens the discussion by providing a synthesis of the readings and his or her preliminary answer to the two study questions. He or she maintains a fairly strict discipline to ensure that the 45 minutes of discussion are focussed. Meetings often conclude with a reflection on the applicability of the learnings to each member's evaluation practice.
- The leader summarizes the materials in a two-page document that is shared with other members.

RESULTS

Between November 2011 and December 2012, this learning circle studied 8 potential topics among a list of about 20: learning circles themselves, contribution analysis, bibliometrics, value-for-money evaluation, realist evaluation, ethical systems in evaluation, systems thinking in evaluation, and emergent evaluation design. We feel that this model has been successful in addressing a need for advanced training that was not satisfied otherwise. A self-assessment after each session found that there were three types of learning outcomes, with a fourth possibility that had not yet occurred:

- *High learning*, where those who thought they did not know about the topic agreed that they had learned enough to have an opinion about it, now know more about what they don't know about it, and would consider applying it in an evaluation project.
- *Comfort*, where those who thought they did not know about the topic realized that they knew more than they thought through their own experience/knowledge or that a hyped-up topic was actually not of earth-shattering importance. This provided a sense of comfort about their state of knowledge in general and their capacity to speak to the topic with a certain level of confidence.
- *Refreshment*, where those who already had some level of knowledge about the topic found the experience a good refresher. The learning circle work forced them to catch up with the literature, and the discussion added value by providing different views on a topic.
- *Disgruntlement*, where members learned nothing or very little from a session, has not so far occurred but is possible.

Table 1 shows the participants' self-rated outcomes in these four categories for each of the learning circle sessions to date. It is clear that learning outcomes are individualized—participants do not necessarily gain the same value from each session—but, collectively, at least some learning is occurring.

CONCLUSION

This learning circle offers its members several advantages over other professional development modes such as workshops and conferences. First, as it is self-organized and flexible, it is feasible for busy profes-

sionals who tend to read only what is necessary, when it is necessary. The distance-learning format is especially important, as members can, and have, participated from practically any location: their offices, others' offices, and their cars. Learning circles have helped make the "someday" reading pile the "today" pile and thus assuage guilt and anxiety over not staying current. Moreover, the circle demands a greater investment than merely reading, and the reading time, discussion, and reflection have been experienced as a professional luxury rarely self-afforded.

Second, shared responsibility for learning means that members support each other in gaining new content and willingly share a wealth of examples from their experiences. The sessions are more interactive than webinars or conference presentations. The group has enough homogeneity to share interests (e.g., evaluation culture and seniority), but it also has enough diversity to avoid group-think (e.g., career contexts are different). The high level of trust in other members and the ethic that views expressed within the group remain with the group has resulted in sessions that are professionally stimulating and sometimes disconcertingly challenging.

Table 1
Learning Outcomes

Topic	Self-assessed Learning Outcomes			
	Learner A	*Learner B*	*Learner C*	*Learner D*
Learning circles	High	High	High	High
Contribution analysis	Comforted	High	Comforted	Comforted
Bibliometrics	High	High	High	High
Value for money evaluation	High	Refreshed	Comforted	Refreshed
Realist evaluation	Comforted	Comforted	High	High
Ethical systems in evaluation	High	High	Comforted	Comforted
Systems thinking in evaluation	Comforted	Comforted	Refreshed	Comforted
Emergent evaluation design	Refreshed	Refreshed	Refreshed	Refreshed

Total over 32 person-sessions:

High: 14
Refreshed: 7
Comforted: 11
Disgruntled: 0

According to the review conducted by Deenadayalan et al. (2008), there is little information about the effectiveness of journal clubs in shaping practice. In their study of the outcomes of learning groups of senior executives, McDougall and Beattie (1995) reported that more than 80% of participants stated they gained substantially from each other regarding achieving insights into other organizations and valued the opportunity to share ideas and discuss concepts in the learning groups. However, only 60% reported they had increased their knowledge of relevant issues. Our self-assessment data tend to support this level of impact: the experience has been very positive, and high learning was reported for about half of participant sessions. In addition, our members have reported that the learning circles are having impacts on their evaluation practice. Examples include recognition that more attention should be paid to certain types of questions (e.g., program costing, unstated ethical premises) and the incorporation of additional models and techniques into proposals and projects (e.g., contribution analysis). To improve the level of learning outcomes in a subsequent set of learning groups, McDougall and Beattie (1995) increased input from the group leader (tutor) and the use of supporting materials and references (i.e., increased directiveness and demand on participants). In our context, where the aim has been to increase accessibility and ease of participation, such strategies may be counter-productive.

There are some potential disadvantages and caveats to our learning circle model that may present challenges to its implementation in other contexts. First, our group is fairly homogeneous, with similar seniority and a long history of successful collaboration. If this model were applied in an intra-organizational context where senior and junior evaluators in one firm or evaluation unit were engaged in co-learning, a status dynamic could affect the discussion. Similarly, if consultants in regular competition with each other were part of the same circle, the competitive dynamic could shape the exchanges. Our group's cohort homogeneity may account for the fact that similar topics appear new and interesting to us, and hence result in relatively satisfactory learning experiences—as demonstrated by the lack of disgruntlement to date. Members of a more heterogeneous group may be disgruntled more often but may also experience increased diversity of ideas in their discussion.[1] Because the small number of articles covered is never an exhaustive review of a topic, key readings could be missed.[2]

Finally, we can suggest that the following factors have been key to the success of this advanced practice learning model:

- Commitment of members to lead and consistently prepare for the sessions (consistent with the findings of Deenadayalan et al., 2008, and McDougall & Beattie, 1995);
- Supportive and open-minded atmosphere (consistent with McFadzean's [2001] description of the collaborative model);
- Willingness of members to explore topics of varying levels of attraction for them, in the interest of supporting each other's learning. This factor was not explicitly identified in the literature we reviewed, but seems important to sustaining commitment to a collective learning process;
- A feasible format adapted to members' schedules and commitments (consistent with Deenadayalan et al., 2008).

Future Developments

This learning circle group is continuing its activities. We are pursuing discussion with CES's Professional Development Committee about the acceptability of this learning model for CE credits. A presentation at the 2012 CES Conference (Kishchuk, Gauthier, Roy, & Borys, 2012) led to several enquiries, and at least three other learning circles have been established. Aiming to support expansion to other "cells," we are constructing a website dedicated to evaluation learning circles to share our experiences and reading lists. While the group will continue self-evaluation of learning outcomes, it would also be of interest to undertake a more formal evaluation if more such circles are established, comparing impacts of this mode of professional development on evaluation competencies and practices to outcomes obtained from other modes.

NOTES

1   We thank an anonymous reviewer for suggesting this point.

2   We also thank anonymous reviewers for suggesting a key article on evaluation learning circles that we missed.

REFERENCES

Bingham, L., Nabatchi, T., & O'Leary, R. (2005). The new governance: Practices and processes for citizen participation in the work of government. *Public Administration Review, 65*(5), 547–558.

Brookfield, S. (1986). *Understanding and facilitating adult learning: A comprehensive analysis of principles and effective practices*. San Francisco, CA: Jossey-Bass.

Cohen, C. (2006). Evaluation learning circles: A sole proprietor's evaluation capacity-building strategy. *New Directions for Evaluation, 111*, 85–93.

Concordia University, School of Extended Learning. (2012). *University of the Streets Café: About the program*. Retrieved from http://www.concordia.ca/extended-learning/community-development/univcafe/about/

Deenadayalan, Y., Grimmer-Somers, K., Prior, M., & Kumar, S. (2008). How to run an effective journal club: A systematic review. *Journal of Evaluation in Clinical Practice, 14*, 898–911.

Gauthier, B., Borys, S., Kishchuk, N., & Roy, S. (2006). Evaluation practice in Canada: Results of a national survey. *Canadian Journal of Program Evaluation, 21*(3), 1–42.

Gauthier, B., Roy, S., Borys, S., & Kishchuk, N. (2010, May). *With a little help from our friends: A study of evaluators' networks*. Paper presented at the 2010 conference of the Canadian Evaluation Society, Victoria, BC.

Hutchins, D. C. (1985). *The quality circles handbook*. New York, NY: Pitman Press.

Kishchuk, N., Gauthier, B., Roy, S., & Borys, S. (2012, May). *Learning circles for advanced professional development in evaluation*. Paper presented at the 2012 conference of the Canadian Evaluation Society, Halifax, NS.

Konisky, B., & Beierle, T. (2001). Innovations in public participation and environmental decision-making: Examples from the Great Lakes region. *Society and Natural Resources, 14*(9), 815–826.

McDougall, M., & Beattie, S. (1995). Learning from learning groups. *Journal of Management Development, 14*(8), 35–41.

McFadzean, E. (2001). Supporting virtual learning groups. Part 2: An integrated approach. *Team Performance Management, 7*(5–6), 77–93.

McFadzean, E., & McKenzie, J. (2001). Facilitating virtual learning groups: A practical approach. *Journal of Management Development, 20*(6), 470–494.

Meisterheim, T., Cretney, S., & Cretney, A. (2011). The Weave: Participatory process design guide for strategic sustainable development. Retrieved from http://www.theweave.info/images/TheWeave-V1-High-July2011.pdf

Scott, J. (2005). The Chatauqua vision of liberal education. *History of Education, 34*(1), 41–59.

Torres, R., & Preskill, H. (2001). Evaluation and organizational learning: Past, present, and future. *American Journal of Evaluation, 22*(3) 387–395.

Natalie Kishchuk has worked in program evaluation and applied social research for over 20 years, on projects in public and population health, education and social services organization and delivery systems, research funding programs, community development, and organizational and technological change. She is a Credentialed Evaluator has received awards from the CES and the SQEP.

Benoît Gauthier has strong experience in organizational research (program evaluation, market research, social research and policy analysis). He holds degrees in political science and public administration, and the titles of Credentialed Evaluator, Certified Management Consultant, and Certified Marketing Research Professional. He has received awards from the CES.

Simon N. Roy is a Partner at Goss Gilroy Inc. Over the last 17 years, Dr. Roy has conducted evaluations in a wide variety of areas including human resources and training, economic development, languages and culture, industrial research, and Aboriginal affairs. He is a Credentialed Evaluator.

Shelley Borys is Director General, Evaluation at the Public Health Agency of Canada and Health Canada. A leader in the CES evaluation community for two decades, she has worked in evaluation at Environment Canada, Citizenship and Immigration Canada, and Ekos Research Associates, and is a frequent professional development educator. She is a Credentialed Evaluator and has received awards from the CES.