



HOW EVALUATION SUPPORTS LEARNING: A CASE STUDY DESCRIBING RESOURCE MEDIA'S USE OF A LEARNING CIRCLE

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Background

Resource Media is a nonprofit communications research and strategy organization based in San Francisco, California, with offices throughout the country. Resource Media seeks to improve the capacity of its clients' conservation and public health work by improving their ability to communicate to audiences both discrete and broad. In its current strategic plan, Resource Media prioritized, among other things, the development of internal evaluation capacity so as to build "a resilient and adaptive organization that could grow with the changing times." (Resource Media, 2010) To support that development, Resource Media sought an evaluation consultant that would help define outcomes of interest, assess Resource Media's capacity to evaluate its own work and establish internal processes and practices to support integrated organizational learning.

In the summer of 2010, Resource Media selected and engaged Organizational Research Services to help Resource Media "garner a better understanding of the impact of [their] work and satisfaction among its partners" (Resource Media, 2011) and to recommend specific processes and practices by which Resource Media could establish a dynamic internal evaluation capacity. Based in Seattle, Washington, ORS has provided outcome-based planning and evaluation services for more than two decades, with particular emphasis on advocacy evaluation, capacity building and the development of internal evaluation systems that promote organizational learning. Resource Media and ORS began their work in September of 2010.

Case Study Purpose

The purpose of this case study is to explore the use of Learning Circles, how this practice can be effectively used to facilitate discussions about evaluation data and findings and how they inform program or organizational improvement and decisions. The principles and lessons learned about the implementation of a Learning Circle conducted with Resource Media staff and board members are useful to other nonprofit organizations and evaluators that wish to use simple learning practices to reflect on data and increase evaluation capacity.

The Project

ORS collected baseline data from stakeholders to learn about the impact of Resource Media's work and help define priority outcome areas. ORS conducted a survey and key informant interviews targeting Resource Media clients and partners, and prepared a summary of findings along with recommendations.

As part of their work with Resource Media, ORS worked with senior Resource Media staff, board members and an internal Evaluation Advisory Group to articulate Resource Media's theory of change, expressed via an outcome map. The outcome map defined Resource Media's short-term, intermediate and long-term desired changes and linked them to Resource Media's strategies. ORS then collected data via surveys and interviews that targeted Resource Media's clients and partners. Surveys and interviews sought input from clients and partners regarding Resource Media's effectiveness as a strategic partner and contractual communications services provider, particularly with regard to advancing policy around environmental issues. Data were meant to provide a baseline and inform iterations of the outcome map as well as Resource Media's internal evaluation system. Surveys and interviews findings were shared with staff using a collaborative learning process.

Throughout the project, ORS worked collaboratively with Resource Media, sharing drafts of outcome maps and survey and interview protocols, seeking input from staff regarding potential interviewees and reporting progress to Resource Media's funders. ORS summarized data collection findings in an evaluation report and sought to continue a collaborative process by presenting findings in a way that promoted Resource Media's reflection and learning. As a result, ORS suggested the use of a practice called a Learning Circle. During a Learning Circle, Resource Media staff and board would review data and findings, and through reflection and discussion, begin to more crisply articulate its role and full scope of services, identify evaluation practices that could help Resource Media measure its future performance and create tools and structures that could support those practices. The events and learnings from the Learning Circle are the subject of this case study.

The Learning Circle

Carolyn Cohen (2006) describes the Learning Circle as a "shared study experience" that can be used with nonprofit organizations of any size that wish to improve their evaluation capacity. This workplace learning practice "combines the study of theory with reflection on practice in the context of work-related experiences." The Learning Circle is not meant to be implemented as a "series of training sessions, but rather as a participatory experience achieved through evaluator-facilitated co-learning sessions."¹ The Learning Circle process has proved effective for organizations that respond to participatory-based lessons, such as Resource Media.

¹ Cohen, C., "Evaluation Learning Circles: A Sole Proprietor's Evaluation Capacity Building Strategy." *New Directions for Evaluation*, N11 Fall 2006

In June 2011, ORS led a Learning Circle that included Resource Media’s management team and board representatives. Resource Media and ORS determined that a Learning Circle was appropriate because of its potential to deeply engage participants in order to grapple with data and discuss implications of findings. Members of the Resource Media group were given a copy of ORS’ evaluation report in advance and were asked to come to the meeting prepared to:

- Share and discuss the findings from the ORS report (i.e., the survey and interview results) and to discuss how the data could be used to further refine Resource Media’s outcome map. In particular, participants were asked to raise questions based on the review of the data and categorize those areas as strengths or areas for improvement for Resource Media.
- Consider possible stories about Resource Media’s “perch” (i.e., their identity with their partners) and discuss how the evaluation data collected helped to support those findings.
- Identify important evaluation questions and possible benchmarks to track Resource Media’s future progress (i.e., internal evaluation system) and could help with program, operational and strategic decision-making.

Cohen (2006) highlights seven things to consider before conducting a Learning Circle. Below are adaptations based on Resource Media’s experience:

1. The learning partner should possess a level of readiness before participating in a Learning Circle. If the evaluator and learning partner are both motivated to participate in learning activities, the process will have greater success. From the start, Resource Media had identified learning as a goal for the partnership with ORS. As a result, they were willing to undertake the Learning Circle process because it allowed for in-depth dialogue about the findings.
2. The evaluator should have a close enough working relationship with the learning partner in order to understand the “full range and scope” of their portfolio of work. For evaluators, being able to lead and participate in a Learning Circle takes preparation as well as interpersonal skills that allow them to build a level of trust during the conversation, particularly on sensitive topics. Evaluators must be good listeners and agile enough to pull out issues as they arise, as well as ask clarifying questions that help to move the discussion along.
3. The focus of the Learning Circle should be driven by the immediate needs of the learning partner so that they can see the connection and salience to their work. In the case of the Resource Media, ORS made sure the direction of the discussion pointed toward extracting lessons from the evaluation report that would help to shape the internal evaluation system, rather than letting the discussion wander toward second-guessing the findings and talking about strategy or tactics.
4. It is helpful to make sure findings are discussed in context and to provide opportunities for reflection using real data. Resource Media was able to roll up their sleeves and wrestle with the data themselves, and therefore could think through proper, realistic next steps that worked well for them (Resource Media, 2011).

5. The Learning Circle process is most successful when broken up into manageable pieces. It is disadvantageous to try and overload a session with too much information; rather, it is best to keep the information “incremental and iterative.” For ORS, that meant defining the agenda up front with a clear purpose that built slowly toward thinking about the tools and measures for the internal evaluation system. The first task was not to brainstorm what the evaluation framework would look like going forward, but rather for participants to establish a level of comfort and understanding about what the data was saying.
6. A successful Learning Circle has an atmosphere that is informal and collegial. ORS created a light atmosphere at the meeting by providing creative alternatives to group data interpretation (e.g., looking at Resource Media’s “perch” through storytelling), which provoked thoughtful discussions about the findings. Participants also felt comfortable in sharing their thoughts and “aha” moments throughout the process, and in particular about what they felt was most useful and applicable to Resource Media.
7. The relationship between the evaluator and the client is a learning partnership, and therefore should create ownership of the findings and how they are applied. Following the completion of the evaluation contract, Resource Media created two key publications entitled Highlights of Findings---Resource Media 2011 Evaluation and Evaluation and Resource Media that share key lessons for the organization as well as next steps to track their performance and hold themselves accountable for the progress and results of their work.

An additional success strategy worth noting from the Resource Media experience is to ensure that there is a strong leader/facilitator role present. While each participant is important to the Learning Circle based on their role in the organization, expertise and knowledge, solid facilitation is key to harnessing all the ideas and energy that come with working with a very engaged group. ORS took the lead by preparing an easily digestible evaluation report, generating good topics for discussion and utilizing their facilitation skills (discussed earlier) to ensure the Learning Circle was a success.

Observations: Successes Using the Evaluation Learning Circle

Based on Cohen’s strategies for conducting a Learning Circle, the process contained many successful elements. However, for the Learning Circle to have been truly successful, its impact should also be seen in changes to Resource Media’s leadership, culture, practices and/or structures (Bickel, Millett & Nelson, 2002). Evaluator observations are shared below that point to successes in those areas.

The Learning Circle was valuable to Resource Media because it helped Resource Media’s leaders to clarify their understanding about the organization’s goals and direction and connected them to the bigger picture. The Executive Team found the Evaluation Learning Circle conversation focusing. It helped all parties share their view of the Resource Media “elephant” and what part of the “elephant” they touch. It also helped staff who felt somewhat isolated within the organization to see and understand how the organization works and how their work fits into the whole. It also helped to improve buy-in from staff about what the whole represented.

Although there was diversity in the perspectives of participants based on their roles in the organization, participating in the discussion and bringing those perspectives together was clarifying. Based on the takeaways staff listed at the end of the session, it's clear that the value of the discussion and of evaluation depends on the person and his or her perspective. For example, a participating Board member was interested in evaluation and its role in accountability; a member of Executive Leadership was interested in strategic thinking and planning; while staff was more interested in the effects evaluation practices would have on how they do the work and on their time. However, having all perspectives together (Board, Executive, Management) helped foster discussion and was clarifying. Although not intended to change perspectives, reflecting in a group with different levels of the organization pushed staff and allowed them to bounce ideas off of each other as well as helped to create a better understanding and build trust.

The Learning Circle helped establish the value of data and fostered data-informed decision making; as a practice, this will be useful for Resource Media's ongoing strategy development.

The Learning Circle process helped Resource Media clarify its theory of change and its unique "perch." The Learning Circle did this by bringing data to the discussion, and suggesting opportunities where data collection could become an ongoing part of Resource Media's processes, rather than being limited to its typical strategic planning cycle. In addition, the data shared during the Learning Circle helped to stimulate new thinking about Resource Media's relationships with some of their specific partners in terms of how they communicated goals for their work and the progress that they are making.

The Learning Circle was useful in helping to define the evaluation and internal evaluation and learning systems. In their brief *Evaluation at Resource Media (2011)*, a number of different evaluation and learning activities are described, including assessment of partner readiness, issue-based evaluation scans, summative evaluation activities and real time feedback for products and services. The Learning Circle discussion also helped to clarify what could/should be measured for monitoring purposes (e.g., satisfaction, number/type of partners) and evaluation purposes (e.g., impact, effectiveness, quality, etc.). The Learning Circle helped clarify what questions evaluation could address versus what questions are best addressed using other field building research projects. Finally, the Learning Circle helped to identify areas of focus for measurement.

Conclusion

This case study described the use of the Learning Circle and how it could be effectively used to share evaluation findings and facilitate discussions that use data for program or organizational improvement purposes. As a result of their learning partnership with Organizational Research Services, Resource Media has increased its capacity to use evaluation to learn about their work, the field, and how to leverage what they learn to achieve their outcomes. The Learning Circle is an effective and easily adaptable process using a participatory approach, real data and skilled facilitation. It deeply engages and informs participants in evaluation findings, and is useful to evaluators who want to see evaluation results used more strategically.