

# **EVALUATION AND STRATEGY LEARNING CIRCLES**

**By**

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# Evaluation and Strategy Learning Circles

## Definition and Purpose

The Evaluation and Strategy Learning Circle (LC) is a shared study experience that can be used to support developmental evaluation, strategic learning or evaluation capacity-building. It provides iterative opportunities to engage an organization's leadership, project staff and other stakeholders in examining real-time data, reflecting on the implications of findings, and identifying action steps where appropriate. The LC is particularly well-suited to complex and dynamic environments, including work with social innovations and collective impact approaches.

In our practice, we generally serve as both the external evaluator and LC facilitator. In a developmental evaluation, we play multiple roles in support of the learning process, including collecting and analyzing findings, serving as a thought partner in a variety of internal settings, and facilitating Learning Circles.

## Setting the Stage: What Happens Prior to Launching Learning Circles

Learning Circles are not a stand-alone process; rather, they are an integral component of our evaluative support designed to foster continuous learning, reflection and adaptation. Depending on the circumstance, there are a variety of steps that can preface the Learning Circle experience. Establishing a trusted relationship among the evaluator-facilitator and LC participants is crucial. From the start, we employ communication strategies that model an inquiry orientation and a collaborative ethic. We often begin the process with an appreciative inquiry (AI) facilitation designed to build a safe environment for reflective practice. In some cases, we also draw on AI to guide the development of a set of underlying assumptions and a theory of change (ToC).

## Preparing for the Learning Circle

We work closely with one or more designated members of our client team to lay the groundwork for each session. These partners (often the CEO, ED, or strategic initiative director) identify the participants for each session and provide input on the proposed agenda. The following steps usually take place three to four weeks before the LC.

1. Identify one salient question. We collectively identify one "burning question" to be explored in the session. Often the question arises from a need to better understand findings that have surfaced during the ongoing developmental evaluation.
2. Convey participant expectations and roles. An advance agenda is used to clarify each participant's role. For example, staff members may be asked to share new findings they have uncovered or to facilitate part of the discussion.
3. Collect data. Data are collected by both the evaluator-facilitator and participants. We prepare and send out an advance memo with our real-time findings. As noted above, participants are also asked to collect and share findings. Generally they bring their findings directly to the session, rather than sending them in advance.

## Facilitating the Learning Circle

Learning Circles are convened on a regular schedule, often on a quarterly basis. We usually meet for two hours, and never for more than three. Each session is documented by internal staff, and we take notes as well. We follow the same format at each session, as doing so sets the tone for the reflective practice.

1. Set the stage for reflection. We start each session with a brief and fun reminder of the LC's purpose and expectations by using a short video, quote or cartoon. A clear and detailed agenda also underscores the direction and purpose.
2. Frame the question. Usually someone from the team has been asked to provide context on why the question we are addressing demands attention and what they hope to learn.
3. Share new learnings. Participants are asked to share insights related to emergent issues and the question at hand. If the project has developed a ToC graphic, we have it enlarged and posted on the wall. As attendees relate their findings, we capture each one on a sticky note and attach it to the related outcome area.
4. Review new data. Participants share new findings relevant to the question at hand. One or more have been asked to facilitate the group's work as we collectively make meaning of the findings. Our role at this stage is to pose challenging questions that further the discussion. We also find this a good time to stay out of their way and to encourage the other LC members to talk directly to each other.
5. Identify action steps. After we have discussed implications of findings and strategic considerations, the group identifies potential action steps. We may facilitate this process with exercises such as "rose, thorn, bud."

## After the Learning Circle: Applying Data to Adaptation

In the short term, the LC results are often incorporated into an array of strategic decisions and action items. We support this outcome by sending a follow-up memo to all attendees that documents the "ahas" and connects the dots between the discussion and other components of the evaluation. However, the value of the LC is in its long-term effects. At its best, the LC supports a deeper understanding of the work at hand, informing adaptation and wise decision-making, identifying new opportunities, and surfacing areas where further clarity and new thinking are needed.

*Carolyn Cohen is the owner of Cohen Research & Evaluation, LLC, based in Seattle, WA. She works collaboratively with clients using strategies such as Evaluation Learning Circles and Appreciative Inquiry to build evaluation capacity, facilitate the use of results for strategic learning, and effect social change. Feel free to connect with Carolyn on LinkedIn at <http://www.linkedin.com/in/cohenevaluation> or to contact her at [cohenevaluation@seanet.com](mailto:cohenevaluation@seanet.com).*