

# Evaluator Learning in Small Organizations

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## Overview

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- Potential barriers and strategies for engaging in effective learning
  - Small organizations/workplaces special?
  - 5 steps for developing an effective plan
- Case examples
- Discussant
- Discussion



## The Small Organization/Workplace

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- Adopts HR solutions as a reaction rather than a strategy (Cassell et al. 2002)
- Less likely to provide formal training due to size specific barriers (Westhead 1998)
  - access, release time, relevance, financial resources, employer incentives
- Prefers informal learning approaches (Dawe & Nguyen 2007)...

## Formal training vs. informal learning

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***Formal learning can be identified as learning which follows a pre-determined plan, is instructor led, and is monitored and recorded by a training provider.***

***Informal learning, on the other hand, can be understood as initiated by the learner or by the circumstances, to address occurring issues.***

*(compare to Dawe & Nguyen 2007)*

# Informal learning

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- Traditionally lower status than formal training
- Can cope with organizational barriers to formal training
- Can often become more effective and reach its potential if structured and use purposefully

# 1. Identify desirable competencies

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- Self-assessment tools
  - *Ghere, Gail; King, Jean A.; Stevahn, Laurie & Minnema, Jane (2006). "A professional development unit for reflecting on program evaluator competencies," American Journal of Evaluation, 27 (1), pp. 108-123.*
  - *McGuire, Martha & Zorzi, Rochelle (2005). Evaluator competencies and performance development. Canadian Journal of Program Evaluation, 20(2), pp. 73-99.*
  - *List:*  
<http://consultation.evaluationcanada.ca/pdf/ZorziCESKnowledge.pdf>
- Check lists
  - E.g., [www.wmich.edu/evalctr/checklists/](http://www.wmich.edu/evalctr/checklists/)
- Discussions with others

## Some Extracts...

Competency	Competency Level		
	Self Rating	Required	Learning Goal
Experimental, quasi-experimental, non-experimental			
Longitudinal			
Case study			
Ethnography			
Naturalistic inquiry			
Phenomenology and epistemology			
Program review			
Survey research			
Mixed method			
Ruling out alternative interpretations			
<i>Sampling and Measurement</i>			
<i>Competency</i>			
Probability sampling			

  

Essential Competencies for Program Evaluators							
	0	1	2	3	4	5	6
<b>Entry / Novice</b>							
<ul style="list-style-type: none"> <li>Developing awareness / building knowledge</li> <li>Limited repertoire</li> <li>Limited experience</li> <li>Unaware of potential problems</li> <li>Unaware of questions to ask</li> </ul>							
<b>Proficient / Skilled</b>							
<ul style="list-style-type: none"> <li>Applying knowledge routinely</li> <li>Basic repertoire</li> <li>Moderate amount of experience</li> <li>Solves problems as they arise</li> <li>Aware of questions to ask and able to access resources to answer the questions</li> </ul>							
<b>Mastery / Expert</b>							
<ul style="list-style-type: none"> <li>Using knowledge fluently and effectively</li> <li>Advanced repertoire</li> <li>Extensive experience</li> <li>Anticipates problems before they arise</li> <li>Poses questions to the field</li> <li>Sought out for input</li> </ul>							
<b>L0 Professional Practice</b>							
1.1. Applies professional evaluation standards	0	1	2	3	4	5	6
1.2. Acts ethically and strives for integrity and honesty in conducting evaluations	0	1	2	3	4	5	6
1.3. Conveys personal evaluation approaches and skills to potential clients	0	1	2	3	4	5	6

## 2. Prioritize and set goals

- Which competencies are/will be most important for your position?
- What is your organizations' priorities and anticipated needs?
  - Learning solution = business solution
- Assess your current level (self-assessment tools, tests, performance reviews)

### 3. Understand the context

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*To help selecting strategies that will work:*

- Supply of formal training opportunities
- Organization's informal learning processes
  - E.g., the workplace informal learning matrix: [www.wilm.ca/en/index.html](http://www.wilm.ca/en/index.html)
- Learner's personal learning style

### 3. Understand the context

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*To help selecting strategies that will work:*

- Potential organizational barriers (small businesses/organizations)
  - Lacking financial resources
  - Lacking access
  - Need for customized learning
  - Lacking employer incentive

## 4. Select methods and indicators

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- Revise your goals and make them SMART
- Brainstorm strategies, e.g.,
  - Evaltalk; learning networks (internal, cross organizational); teaching; mentoring; reading journals, books, websites; action learning; lunch and learn; peer review committee; formal or informal client or associate feedback
- Prioritize and select – make it fit together
  - Blended more effective than single

## 5. Ensure accountability for plan

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- ***Initially:*** build into performance review or other agreement with supervisor/associate
- ***Ongoing:*** Do learning activities meet expectations? If not, make adjustments
- ***3-6 months after learning activity:*** Have you integrated learning in practice as planned? If not, make adjustments.
- ***Annually:*** Sum up, evaluate, re-plan

## References

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## Discussion Questions

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- What are some examples of informal learning activities you have done?
- What are some challenges when structuring informal learning approaches?