

EVALUATION: HOW ARE THINGS GOING?

5

Evaluation is a key part of the overall plan to train and support facilitators. Evaluating the facilitation component of your program can help you:

- learn what is and isn't working well.
- monitor how the facilitators are doing and respond to their needs.
- come up with new strategies to improve your program.
- explore the impact of the study circle process on the facilitators.

A good evaluation should promote practical learning. It should apply fair and appropriate measures. And it should generate information that will be useful to the people who are working to make the program stronger.

This guide presents a range of evaluation tools that will help you collect information about the process of recruiting and training facilitators, the quality of the facilitation, and the facilitators' experiences. But "one size does not fit all." That's why it is important to tailor the evaluation to fit your program.

Please note that the sample forms we provide in this section can also be used in conjunction with those in SCRC's *Planning Community-wide Study Circle Programs: A Step-by-Step Guide*. We encourage you to partner with members of your program's coalition, steering committee, or working group to plan and administer the evaluation, and to analyze and report the results.

Sharing ownership of the evaluation

When you and your partners are committed to learning together, your collaboration will make your program stronger. As you prepare and implement your evaluation plan, do what you can to advance a sense of shared ownership of the evaluation process. Trainers, organizers, facilitators, and participants all have a part to play in ensuring that the study circle process goes well. There are many possible strategies for creating that sense of ownership and shared benefit. Here are a few suggestions:

- Involve your facilitators in the process of setting up the evaluation. The goal of the recruiters and trainers is to make sure that facilitators gain proficiency in study circle techniques, and that they learn to apply the principles presented in this guide. At the training, engage both facilitators and trainers in a discussion of evaluation. For starters, ask the group a simple question: “How would you know if a study circle facilitator has done a good job?” Urge them to be as specific as possible! (You are likely to find that both trainers and facilitators set high standards.)
- Then, describe your plans, share the forms included in this manual, and invite feedback.
- Next, listen and respond to their concerns and ideas for this evaluation.
- Let facilitators and participants know how you plan to report the results. This is an important factor that will influence how people feel about the evaluation process and how much they value the feedback they receive. Emphasize the ways in which the information will be beneficial to them and to the program as a whole.

When facilitators feel a sense of ownership of the evaluation, they are more likely to see the evaluation as an expression of your commitment to them. As a result, they are more likely to do their part to gather and provide information, and appreciate constructive feedback.

Finding partners in your community

There are many people in your community with the skills to help you put an evaluation plan into practice, to collect and organize information, to interpret data, and to develop strategies for reporting. Where might you look?

- (1) Check with your program organizers to see which coalition members or sponsoring organizations can contribute expertise and staff time to the evaluation.
- (2) Inquire at a local college or university to find out if a faculty member can help, or find a graduate student who would be interested in coordinating a study circle evaluation as part of a thesis or dissertation.
- (3) Enlist the services of an independent researcher. In a growing number of study circle programs, research firms are offering their services pro bono, as a contribution to the community program.
- (4) Ask community members to help you by administering and collecting forms, doing data entry, and working on newsletters that report the results.
- (5) Recruit people with computer skills to help meet your information management needs.
- (6) Consider asking your more advanced facilitators to serve as peer reviewers and mentors for newly trained facilitators. They can help by observing new facilitators in action, or by going over the evaluation results with first-time facilitators.

How can SCRC help?

With plenty of lead time, SCRC staff can help with conceptualizing and reviewing your evaluation strategy, and even with developing tools and analyzing data. We can also keep you informed of what's happening with other study circle programs, and help put you in touch with other evaluators who are doing original research.

We do ask that you keep in touch with us as you develop and implement your evaluation and that you share the results with us. Please send us copies of your evaluation reports. Our staff will review the results and suggest strategies for strengthening your program.

Tailoring the evaluation

As you think about how best to evaluate your study circle program's facilitation component, feel free to pick and choose among the forms presented in this manual. Choose the ones that seem most appropriate for your information needs.

If time allows, or if you're working with an independent evaluator, you may decide to develop your own research design and original evaluation tools. Evaluators of study circle programs should feel free to adapt the forms in this guide. (Please send SCRC copies of the tools you develop.)

The most important thing is to find a strategy that works for you. And remember to leave room to grow as your study circle program develops! ↻

Sample forms in this guide

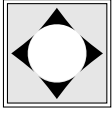
Facilitator profile	53
Designed to gather basic information about new facilitators (demographics, experience, and contact information) before they attend a facilitator training.	
Training evaluation	55
Designed for use at a facilitator training.	
“Checking in” with the facilitators	56
Presents a range of questions to guide a focused conversation with a small group of facilitators. This conversation should take place <i>after the second or third study circle session</i> . (If you can arrange another meeting, this can also be repeated after the last study circle session to give you a sense of how much the facilitators are learning and to explore the effects of the study circles on facilitators.)	
Performance appraisal for study circle facilitators	57
Designed for facilitators to provide feedback at the end of the program.	
Facilitator evaluation for study circle participants	59
Designed for participants to fill out at the last session of their group’s study circle meetings. This form includes key questions about facilitation, which can be incorporated into a questionnaire that also asks about other components of the program.	
Reporting back to SCRC	61
Provides a way to keep us up to date on your work. Ask program organizers to complete this form at the conclusion of a round of study circles.	

Other useful strategies

Facilitator diaries furnish a log of facilitator’s activities and experiences. Provide some key questions that you’d like them to reflect on after each session.

Observers are especially valuable when it comes to monitoring the quality of facilitation and offering constructive feedback to new facilitators. (Consider converting the *Facilitator evaluation for study circle participants* into a checklist for observers.)

One-on-one interviews with facilitators allow for in-depth discussions about a set of key questions. These can be time-consuming, but they can also provide a rich level of detail and insight.



Facilitator profile

Thank you for answering the questions that follow. Please be sure to respond to the questions on both sides of the page. Your responses will be used by program organizers to match you with a group or with a co-facilitator.

Part 1: Your background

1. Do you have experience in small-group facilitation, or is this your first experience?

- I have experience in small-group facilitation.
- This will be my first experience in small-group facilitation.

2. Please tell us about the skills and training that you bring to study circle facilitation.

3. Are you male or female?

- male
- female

4. How old are you?

- 12-17
- 18-29
- 30-39
- 40-49
- 50-64
- 65 and over

5. What is the last year of school you completed?

- less than high school
- some high school
- high school graduate
- some college
- college graduate
- postgraduate work or certification
- advanced degree

6. What is your occupation?

7. Are you ...

- African American/Black?
- Asian American?
- Hispanic/Latino?
- Mixed race?
- Native American/Indian?
- White/Caucasian?
- Other? (Specify) _____

8. How did you become involved in this program as a facilitator?

9. Do you possess special knowledge or expertise about a particular issue or issue area? (Check all that apply.)

- community visioning
- crime/violence
- diversity issues
- education [adult/training/continuing education]
- health care
- education [children/youth]
- immigration
- religion
- substance abuse
- welfare reform
- youth and children's issues
- race relations/racism
- Others: (Specify) _____

Over ▶▶▶

Part 2: Contact and scheduling information

Please provide the following information:

Name of the person who recruited you: _____

Your name: _____

Your address: _____

Your telephone number: _____

Your fax number: _____

Your e-mail address: _____

Proposed training sessions are listed below. **Check your 1st and 2nd choices.**

<i>Date</i>	<i>Day of the week</i>	<i>Time (note A.M. or P.M.)</i>	1st choice	2nd choice

All training sessions will be held at [location] _____. After we sort out people's choices for dates and times, you'll receive a postcard confirming your reservation for a training session. If you have any questions or need additional information for the training sessions or registration, please contact [name] _____ at [telephone number] _____.

Part 3: Facilitator pledge

Responsibilities of study circle facilitators include:

- ✓ making a firm commitment to facilitate discussions for each session of the study circle.
- ✓ attending at least one of the training sessions for study circle facilitators.
- ✓ working with the organizer who recruited you to establish mutually acceptable dates and times for your sessions.
- ✓ helping study circle participants engage in lively, focused discussions.
- ✓ remaining neutral during those discussions.
- ✓ preparing for the discussion by reviewing the discussion materials and the tips for facilitators.
- ✓ providing feedback to organizers and assisting with administering evaluation forms.

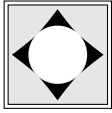
I understand the responsibilities of a study circle facilitator and agree to take on the role.

Your signature

Date

Return to: _____

_____ ↻



Study circle facilitator training evaluation

1. Was participating in this study circle training valuable to you? (Circle one point on the continuum.)

0.....1.....2.....3.....4.....5.....6.....7
generally a waste of time *an extremely valuable experience*

2. Did the training meet your specific expectations?

- yes
 no

Please explain:

3. Before today's training, had you ever participated in a study circle?

- yes no

4. How well do you understand the ideas behind study circles?

- very well fairly well not well at all

5. Do you feel ready to be assigned to a study circle, or not?

- Ready! I can't wait to get started.
 I feel more ready to organize than I do to facilitate.
 I feel more ready to facilitate than I do to organize.
 I need to practice, but I'll be ready soon.
 No, I do not feel ready to start facilitating study circle.

Reason:

6. What was the most rewarding part of this training? Why?

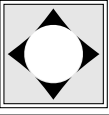
7. What was the most frustrating part of this training? Why?

8. What would you like to see the trainers do the same way next time? Why?

9. What, if anything, would you like to see the trainers do differently next time? Why?

10. Other comments:

Your name: (optional)



“Checking in” with the facilitators

It is important to get feedback from facilitators midway through a study circle – that is, after the second or third session, while the study circles are still in progress. There are a number of ways to do this. The questions listed below form an outline for an informal, focused conversation with a small group of facilitators. This approach has two main advantages. First, it provides facilitators with an opportunity to share their experiences, and to listen and learn from each other. Second, for the trainers or program organizers (whoever is responsible for “quality control”), this kind of focused conversation gives you a chance to monitor the progress of your facilitators, hear more about their needs, and identify any problem areas. It also provides a chance to learn more about the kinds of effects the study circle program is having on the facilitators.

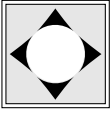
Pointers:

- Keep the group small. Six to ten people is the ideal size.
- Find a neutral moderator, preferably not someone from your program staff.
- Find another neutral person to take notes or record the answers facilitators give to your questions.
- Before you start the conversation, explain how you will use the comments facilitators are about to share about their experiences.
- Afterwards, talk with the moderator and the program staff about what the group members said. If you do a write-up of the conversation, do not connect people’s names with specific comments. If possible, make the write-up available to the facilitators who took part in the group, and let them know how you’re responding to what they told you.

For help, see Richard A. Kruger and Jean A. King’s *Involving Community Members in Focus Groups*. Focus Group Kit #5. Thousand Oaks, CA: Sage Publications, 1988. <order@sagepub.com>

Questions — *These questions are a starting point for trainers to use in informal, focused conversations with facilitators.*

1. Tell about your experiences as a study circle facilitator. How are things going?
2. In your facilitation of the discussions, what are you most proud of?
3. What techniques or questions work best for you?
4. a) What situations do you find the most challenging? [You might want to prompt a response with one or more examples: “Is staying neutral a challenge for you? Dealing with a domineering person? Involving a shy person? Getting beyond the ‘too much niceness’ stage?”]
b) Please give a specific example of a difficult or frustrating situation that came up in your group. What happened, and what did you do to address the situation? What would you do differently next time?
5. How is the group handling conflict when it arises?
6. Are there ways we could better support you?
7. Is there anything we missed that you’d like us to know about? ⇄



Performance appraisal for study circle facilitators

Please be sure to respond to the questions on both sides of the page.

Group name: _____

Location/site of your study circle _____

1. When did your study circle meet?

_____ day _____ time

2. How many times did your study circle meet?

3. Generally speaking, how satisfied have you been with your experience as a study circle facilitator?

- very satisfied
- somewhat satisfied
- not at all satisfied

Why?

4. What was your most satisfying experience as a facilitator? Please provide an example:

5. What was your most frustrating experience as a study circle facilitator? Please provide an example:

6. In all, how many people participated in your study circle? (Count everyone who attended at least one session.) _____

6a) How many people started with the first session?

6b) How many of those people attended all the sessions? _____

6c) How many people attended only one or two sessions? _____

7. How satisfied were your participants with the study circle process?

- Most participants seemed satisfied.
- Most participants expressed dissatisfaction.
- Most participants expressed both satisfaction and dissatisfaction at various points in the process.
- I couldn't judge their levels of satisfaction.

Please explain:

8. Did you have adequate support from the program organizers, or not?

- Yes
- No
- Not sure

Please explain:

Over ▶▶▶

9. What additional support would have been helpful?

10. If you were to facilitate another study circle, what, if anything, would you change about your performance?


11. If you were to facilitate another study circle, what situational factors would you change (for example — discussion materials, overall organization of project, meeting site, etc.)?

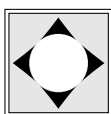
12. What difference has taking part in this study circle program made in you personally?

13. What difference do you see this study circle program making in the community?

14. Other impressions, concerns, and comments:

Your name: (optional)

_____ 



Facilitator evaluation for study circle participants

For each item, simply check the box next to the response option you select. Thank you!

Group name: _____

Location/site of your study circle _____

1. Did your group have...

- one adult facilitator a team of facilitators one youth facilitator

2. What did you like best about the way your facilitator(s) led your study circle?

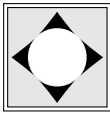
3. What do you think your facilitator(s) should do differently next time?

4. Do you agree or disagree with the following statements? (Please mark one box for each item.)

	<i>Disagree strongly</i>	<i>Disagree</i>	<i>Agree</i>	<i>Agree strongly</i>
(a) The facilitator(s) began and ended sessions on time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) The facilitator(s) helped the group set the ground rules for the discussion and stick to them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) The facilitator(s) set a friendly and relaxed tone for the conversation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d) The facilitator(s) listened well.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(e) The facilitator(s) remained neutral.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(f) Group members were encouraged to talk to each other, not just to the facilitator(s).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(g) The facilitator(s) helped the group discuss different points of view productively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(h) The facilitator(s) seemed to be familiar with the discussion materials.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(i) The facilitator(s) encouraged everybody in the group to participate in conversations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(j) The facilitator(s) did a good job of keeping any one person from dominating the discussions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(k) The facilitator(s) encouraged quiet members of the group to share their ideas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(l) The facilitator(s) worked hard to keep the discussion on track.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(m) The facilitator(s) offered periodic summaries of the discussions, and/or encouraged group members to do so.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(n) The facilitator(s) made sure that someone took accurate notes about the group's concerns and action ideas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(o) The facilitator(s) handled intense situations well.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Any other comments?

Your name: (optional) _____



Reporting back to the Study Circles Resource Center

At the end of a round of study circles, please work with program organizers to complete this form and return it to: **Study Circles Resource Center, P.O. Box 203, Pomfret, CT 06258.**

The more information you provide, the better! Please also send us any documentation, training materials, agendas, evaluation reports, or other materials that would help us to better understand your program's accomplishments and areas of growth.

Your name: _____

Your phone # /E-mail: _____

Your community's study circle program name: _____

Community, State: _____

Part 1: What's happening in your program when it comes to facilitation?

1. What issue is your program addressing?

1a. Which study circle discussion guides are you using/have you used?

2. In ____ (fill in current year), how many facilitator trainings did you conduct?

3. To the best of your knowledge, how many facilitators have been trained throughout the life of your program?

4. How many facilitators did you train in ____ (fill in current year)?

5. To the best of your knowledge, what percentage of these newly trained facilitators went on to facilitate their own study circle(s)? _____%

Part 2: How are things going with the facilitation component of your study circle program, and what are you learning?

6. How would you rate your study circle program's facilitation trainings?

excellent good only fair poor
Reason(s):

7. How would you rate the job that your facilitators are doing?

excellent good only fair poor
Reason(s):

Over ▶▶▶▶

8. Describe your most rewarding experience with facilitation during this round of study circles:

9. Describe your most challenging experience with facilitation during this round of study circles:

10. Please share two lessons that you have learned about how to achieve quality facilitation in study circles:

1)

2)

Part 3: How are we doing at SCRC?

11. When it comes to ensuring quality facilitation in study circles, what services does SCRC currently provide that you find most useful?

12. Specifically, how important are the following services to the quality of the facilitation in your program? Are they very important, somewhat important, not very important, or not at all important?

	<i>Very important</i>	<i>Somewhat important</i>	<i>Not very important</i>	<i>Not at all important</i>
(a) Tips to facilitators in the study circle discussion guide in use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Having a copy of this training guide	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) SCRC's guidelines on evaluating study circle facilitation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d) Articles about facilitation and training in <i>Focus on Study Circles</i> (SCRC's quarterly newsletter)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(e) Training advice and assistance from SCRC staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(f) Networking with experienced study circle organizers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. When it comes to helping you ensure quality facilitation in your study circles, what would you like to see SCRC do differently in the future?

14. Other comments:

Thank you for filling us in! ↻