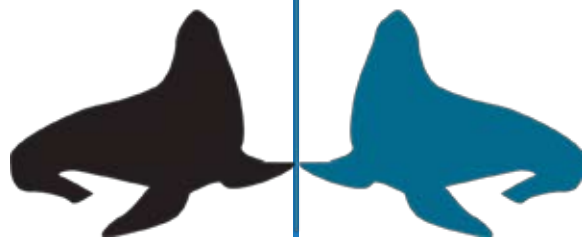


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SELF EVALUATION **IN ADULT** LIFE LONG LEARNING





Socrates
Grundtvig

SEALLL is a Grundtvig 1 project, part of the European Socrates educational programme.

Socrates / Grundtvig however is not responsible for any content in this book

Introduction

QUALITY

Quality assurance has become a very important issue in education and training. Policy makers and professionals in the field are aware of the need for quality at all levels. The overall tendency towards the greater autonomy of educational organizations has moved the responsibility for this quality towards internal processes. In many countries external control bodies have taken a step backwards, and now try to find a new position in a common structure for external and internal quality assurance.

Self-evaluation is an essential step to quality improvement, but introducing a culture of self-evaluation in an organisation is not easy. It should be carried out in an open, participative and democratic atmosphere. Life Long Learning situations are often less formal and less structured than school and higher education. Therefore quality care, self-evaluation, self-regulated learning and setting up the institution as a learning organisation is even more important in LLL than in formal learning situations.

SEALLL is a Grundtvig 1 project, part of the European SOCRATES educational programme. It aims to improve the quality of teaching and learning and the quality of organisation and management in LLL by promoting and supporting self-evaluation. The project wants to help all 'players' in LLL-organisations self-evaluate their teaching, learning and management.

SEALLL is not another suite of ready made evaluation instruments with indicators to check and boxes to tick. SEALLL focuses on self-evaluation as a learning process. The project partnership is convinced that a culture combining self-evaluation and quality care with ownership of processes and outcomes is vital for an evaluation process to have a real chance to make an impact and lead to change. Therefore the priorities of SEALLL are a bottom-up approach and guiding the 'initiators' in the process of conducting their own evaluation.

SELF

In order to distinguish it from external evaluation or inspection, self-evaluation is seen to be self-initiated, internally organised and self-regulated. It should aim at the professionalisation of decision-making; at improving the achievement of the organisation's own objectives; and at enriching the quality of training, learning and management in the organisation. Where legitimacy and accountability based on externally imposed indicators are at stake, evaluation processes are referred to as external, even when they are partly internally organised.

The 'self' in self-evaluation can be an actor or a group of actors within the organisation: an individual such as a teacher, trainer, learner, programmer, or director; or a group of individuals e.g. a group of teachers, the management team, a class group of learners, or indeed the whole staff of the organisation. Evaluation is only considered self-evaluation if the initiator(s) also evaluates their own role in the process that is being evaluated. You have to ask reflective questions regarding your own role.

Instruments are 'evaluation instruments' for collecting or gathering the necessary information. They are only self-evaluation instruments if they are used in a self-evaluation context.

THE MANUAL

This manual has three distinct parts:

Part one offers a conceptual framework and guidelines for planning and managing self-evaluation processes in adult education organisations;

Part two is a practical guide for facilitators of self-evaluation;

Part three gives an overview of possible evaluation instruments that can be used in self-evaluation processes.

With this manual we want to offer practical material for all 'actors' in LLL to help them walk the path of self-evaluation. The manual is also translated into Dutch, German, Lithuanian, Swedish, Turkish and Polish and can be downloaded for free in .pdf from the project website:

www.sealll.eu

In addition to the manual the SEALLL project also generated a website. The SEALLL approach to self-evaluation involves an internal initiator who goes through the different steps of the process with all the relevant players. This process is presented in a format with a description of the steps and the necessary actions and information needed.

As well as the manual the SEALLL website offers a number of practical examples of self-evaluation processes, following this format. These were contributed and created by the SEALLL project members. The examples are arranged in a grid depending on 'initiator' and 'object'. They are meant to serve as a source of inspiration and suggestions for 'initiators' in similar conditions or with similar aims.

THE PROJECT

The SEALLL project turned out to be a very fruitful learning experience. I would like to thank all partners and members for their work and for their contributions. A special thanks goes to Jaap Van Lakerveld,

Anita Caals and Selma van der Haar for their contribution to this manual, and to all other partners for their input and comments in a very open and constructive atmosphere. This is also the right place to thank the European Commission for their financial support within the frame of Grundtvig 1 and for their guidance during the life span of this project.

As project manager of the Landcommanderij Alden Biesen, it was a pleasure for me to coordinate this project with 9 partners from 8 different countries. The Socrates programme has created opportunities for constructing innovative approaches to educational issues in a European context. It is always a challenge to bring different institutions, people, cultures and visions together. In SEALLL it was special to be part of the 'learning process' the group went through over the years.

On behalf of the partnership I express the hope that the SEALLL products will contribute to quality in LLL settings and especially to the awareness that the care for this quality is a concern for the whole team.

Guy Tilkin
Coordinator SEALLL
Editor

Lies Kerkhofs
Director Alden Biesen

Partners

LANDCOMMANDERIJ ALDEN BIESEN, BILZEN, BE, COORDINATOR

Guy Tilkin

PLATO , FACULTY OF SOCIAL SCIENCES, UNIVERSITY OF LEIDEN, NL

Jaap Van Lakerveld

Selma van der Haar

SOROS INTERNATIONAL HOUSE, VILNIUS, LT

Daiva Malinauskiene

KWASIMODO, BRUSSELS, BE

Anita Caals

FUNDACJA CENTRUM EDUKACJI OBYWATELSKIEJ, WARSAW, PL

Kasia Batko

Iwona Kania

ISIS INSTITUT FÜR SOZIALE INFRASTRUKTUR, FRANKFURT AM MAIN, DE

Karl Mingot

THE BAUER-MESSNER EVALUIERUNGS KEG, GRAZ, AT

Christa Bauer

Angelika Petrovic

CENTRE FOR FLEXIBLE LEARNING, SÖDERHAMN, SE

Tove Elvelid

AKDENİZ UNIVERSITY CENTER FOR CONTINUOUS EDUCATION (AKUNSEM), ANTALYA, TR.

Burhan Ozkan

Gunsiray Kosun

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1. PHILOSOPHY OF SELF-EVALUATION

I. INTRODUCTION

SEALLL is an acronym title for the name of the project, Self-evaluation in Adult Life Long Learning. In this article we will give an outline of the basic philosophy of the project. Firstly definitions of adult lifelong learning (ALLL) and self-evaluation (SE) will be given. Secondly we will elaborate on the particular functions that self-evaluation in ALLL may serve. Then the article will consider practical applications by offering a framework for designing self-evaluations. The basis for the article is self-evaluation in adult lifelong learning as an initiative to involve people in a shared experience in which systematic analysis of, and reflection on, education activities serves as the engine for both individual and collective learning. Important in our approach is the focus on evaluation as a way of active learning; the vital role of dialogues and the inclusion of all parties involved and impacted on.

II. RATIONALE

Before going into the details of self-evaluation, we would like to raise the issue of why one would decide to introduce such a concept into adult Life Long Learning. What makes self-evaluation attractive or worth while? It is our conviction that, by evaluating their own work and more in particular their own role within this work systematically, people or groups of people, work on their own professional development. Being evaluated by others may occasionally have an effect, but a self-evaluation has more impact. It adds to the understanding of one's own situation, it raises one's competence in dealing with that situation, it helps people to share their experiences and thus it enhances the professional performance of individuals and of teams.

Self-evaluation empowers. The insights gained from shared reflection on their own practices provide people with the knowledge needed to defend more effectively what should be maintained and to launch improvement and change where necessary.

Self-evaluation creates a sense of ownership and commitment. The work really becomes your own. Teachers, trainers, or educators are not just employees, they are professionals. Professionalism implies autonomy to make decisions and choices. The other side of the freedom to make these choices is the obligation to account for them. Self-evaluation will be crucial for that purpose.

Self-evaluation enables dialogue between all parties concerned in teaching and learning. As such it makes things transparent and allows for a better match between what is needed from the perspective of learners and stake holders, and what is offered by teachers, trainers or educators.

So far self-evaluation has been mentioned, but not yet fully explained. In the following sections we will describe it in more detail. We will explain its background, our views and what we think is necessary for planning and managing such evaluation processes.

III. ADULT LIFE-LONG LEARNING

The term 'adult education' is used in various ways in different contexts. A glossary developed by Unesco and published by Paolo Federighi c.s. in 1999 states that the objectives of adult education go beyond the boundaries of the school system and of professional training. It includes the entirety of learning activities, including those of an informal or accidental nature, present in work and everyday life (Federighi, Hamburg 1999).

In its Communication " Making a European Area of Lifelong Learning a Reality", the European Commission mentions adult education as an entity to be differentiated from schools, higher education, vocational training, and non-formal (youth) learning (Brussels 2001).

We consider adult education and learning to be post compulsory education and learning activities. Initial university training, initial vocational training and professional training are excluded. Yet we know that the boundaries between the various kinds of learning are sometimes blurred, and we realize that the challenge often is to create synergy between these subsystems rather than to consider the boundaries between them as fixed.

IV. SELF-EVALUATION: A DEFINITION

Self-evaluation of education and/or learning is the process of systematic collection, analysis and exchange of data concerning educational processes of either individuals, groups or organisations (institutions, etc.) in order to facilitate learning among all parties concerned so value judgments and decision-making may be based on evidence rather than on intuition.

Perhaps the most critical issue in this definition is the concept of "self". Who may be considered the self initiating the self-evaluation? According to the definition we can allow any unit to enter into self-evaluation. Sometimes this may include only one group of workers in one institution. Sometimes it may include the work of people working in more than one unit or location at the same time. However the only thing on which agreement is necessary is that all parties consider the process to be a self-evaluation and that they have the same level/unit of analysis in mind.

In order to distinguish self-evaluation from external evaluation, it must be seen to be initiated by the organisation, internally organized and self-regulated.

V. FUNCTIONS OF SELF-EVALUATION

Self-evaluation may serve various functions. In this section we mention some of these functions and elaborate them to some extent. However, in the end we will choose to focus on self-evaluation as a process

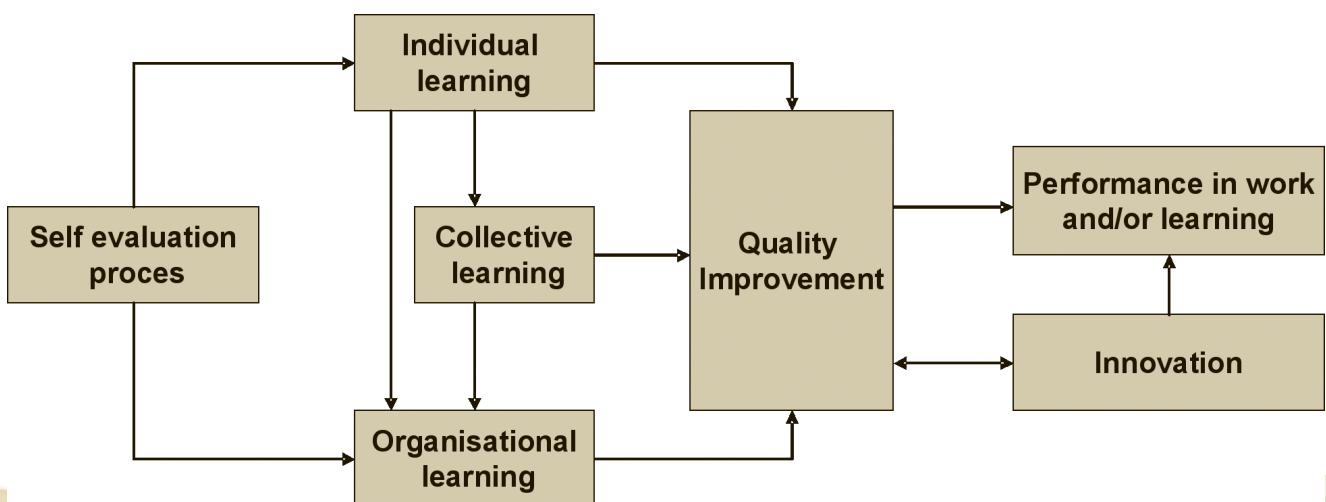
that supports the professional learning of all parties involved and needs to be organised accordingly.

LEARNING

Self-evaluation focuses on learning, as the definition suggests. The kind of learning referred to is both individual learning and organizational learning. Individuals learn to understand better the situation in which they work and the relationship this has to individual and collective aims. Furthermore, an organisation can learn from the process and the dynamics of the process of self-evaluation. At the same time self-evaluation helps the group of people involved to enhance their understanding of how they may operate more effectively and satisfactorily as a team. Also a lot of other people will learn from their colleagues from the process of sharing and dissemination of the results of the self-evaluation. Then they can adopt and adapt these results, which will augment the effects and the impact of the self-evaluation

But an organisation is more than a group of individuals - it is an entity in its own right. This entity can also learn from the self-evaluation. In an organisation, self-evaluation may be used as a continuous management tool. Organisations try to deliver quality. That means satisfying the demands and expectations of participants and stakeholders, both internal and external to the organisation. self-evaluation provides information about the needs of current and potential participants and about the way they assess the services provided. A quality organisation seeks to perform efficiently and effectively. Self-evaluation gives information on how to take strategic decisions in these matters.

Both the individual and the collective or organizational learning will have an impact so that the quality of work and learning can grow. The innovative capacity of the organization will grow with it. In essence, this implies that those who learn from self-evaluation do better and know how to improve their work and learning.



TROUBLE SHOOTING

During the interaction between looking to the past and trying to plan for the future, the organisation can discover issues or problems requiring immediate attention. The self-evaluation can provide more information and data to understand the origin of the problems. In fact the goal and/or result of the self-evaluation may be immediate intervention to avoid further troubles without being bothered about

sophisticated professional learning processes. This function of self-evaluation is perfectly legitimate and sometimes very necessary. Its relevance is almost self evident.

REDUCING EMOTIONAL PRESSURE

In addition to the functions mentioned, self-evaluation also provides people with an opportunity to express themselves, and to share enthusiasm or complaints. It is an outlet for the emotions involved in any process of education. As such it may be considered as therapy. It contributes to well-being, reduces frustration and allows for celebration and sharing.

ACCOUNTING

Self-evaluation is not only a way to explore the dynamics of one's own education activities; it is also a means to provide evidence of the quality your unit or organisation offers to the outside world. By performing self-evaluation a project, an initiative or an organization will be able to account for its actions. Self-evaluation provides evidence which may be used to convince the outside world that things are running well. Funding agencies, the community, and local, national and transnational authorities may be among those in need of convincing. For this accounting purpose, self-evaluation may include actions aimed at providing evidence of good practice, good learning outcomes, good effects and relative performance, in comparison with other similar initiatives.

PUBLIC RELATIONS

Self-evaluation may include interviews or questionnaires carried out among various groups of people concerned e.g. students/learners, stakeholders, funding organizations, sponsors, employers etc. By approaching these groups and agencies with questions, one may spread the news about the initiative. As such self-evaluation has an effect similar to a campaign. The news is spread, new clients may be targeted, new markets may be opened and new sponsors may develop an interest as a consequence. In self-evaluation an element of needs-assessment or making inventories of expectations, is often included. Thus the self-evaluating group seeks contact with its environment. By doing so it raises interest, and it becomes more responsive to the needs of its audiences and target groups. This is what some people would refer to as a kind of marketing. It is a way of approaching clients and raising awareness amongst them and other providers of their own needs and requirements, and the provision available.

Self-evaluation stimulates marketing and dissemination. These effects are not the primary objectives, but very useful secondary or impact effects. Awareness of this possibility may allow people to optimize these indirect results.

As stated earlier, we will consider the learning processes of individuals and groups as the core process and goals of self-evaluation. We consider the other benefits to be added value or spin-off effects. This choice may be considered the corner-stone of our self-evaluation philosophy.

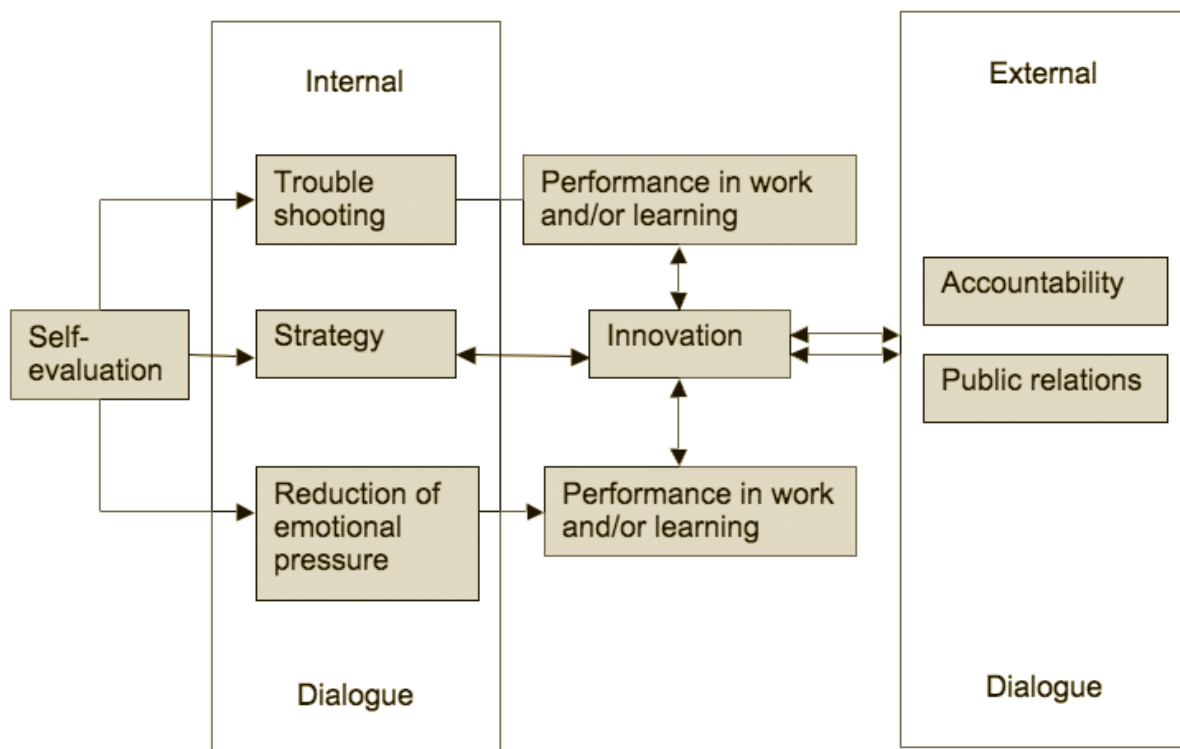
VI. SELF-EVALUATION IS A LEARNING PROCESS

If learning is the core of self-evaluation, we will have to realize that self-evaluation might better be organized as a learning process.

Adult educators know that the learning of adults has to meet a number of requirements.

- It has to recognize and adapt to the prior knowledge and experience of the learners;
- It has to be motivating both in its goals and its processes;
- It has to challenge and create a sense of confidence at the same time. It is the balance that matters;
- There must be a balance between the learning aspect and the work involved in self-evaluation. It must be perceived as achievable;
- It needs to allow for and stimulate self-regulated learning as a means and as an end;
- It has to be an active process rather than a receptive process;
- The results of the self-evaluation should be used as a part of the organisational learning rather than an exclusively individual process;
- It should provide learners with rich opportunities to search for and construct knowledge;
- It may better concern personalised knowledge rather than abstract de-personalised knowledge;
- It should provide the learner with opportunities for interactive dialogues to check and cross-check their understanding, and to get peer feedback on their progress;
- It has to be reflective in such a way that it provides learners with feedback on their performance as well as on their learning strategies;
- It should offer an environment of mutual respect secured by agreements on privacy and ownership;

These requirements have to be met in order to optimize the process of adult learning. We consider people who evaluate their own work as learners, so the process of self-evaluation has to meet exactly these same requirements. This means that self-evaluation must be a motivating, rich, constructive, social and reflective process. In the following sections some of the implications of this point of view are further elaborated.



VII. ORGANIZING SELF-EVALUATION AS A LEARNING PROCESS

MOTIVATING SELF-EVALUATION

Self-evaluation will motivate us to learn from our experiences. This implies that we need to know the benefits of self-evaluation for ourselves, for our work and for the organisation. We should consider it as a challenge, but at the same time we must feel that we are ready for it and able to complete the process effectively. We will have to consider it a worthwhile activity. Learners tend to appreciate variety in activities e.g. writing, listening, talking, visualizing, theorising, sharing, acting, playing. Another important element in motivation is changing the physical activities e.g. sitting, walking, moving, playing, using multiple senses. People acknowledge the benefits of self-evaluation, but too often it is seen as an additional activity and not as a core part of the business of the organisation. By integrating self-evaluation into the daily work of an organisation, it will be much easier to establish the right balance between efforts invested and their effects. Thus self-evaluation may be more motivating.

Many evaluations only include questionnaires and interviews, and thus fail to make it the memorable and fascinating event it should be, if it is to be used to stimulate professional learning. Our challenge as self-evaluators and promoters of self-evaluation will be to change this perception and to develop creative, stimulating and strengthening strategies. For self-evaluation to be supportive to the learning of the people involved, it must meet four basic motivational requirements.

- The purpose of the self-evaluation must be obvious;
- It must consist of a variety of activities which are motivating in their own right;
- Possible learning outcomes must be clear;

- It should be clear that the results will be useful.

A SELF-EVALUATIVE WORK/LEARNING ENVIRONMENT

A “rich environment” was the phrase used earlier in this text. If we consider self-evaluators as learners, we should seek to bring them into a rich learning environment where they are able to learn a lot about the dynamics of the work-learning process of which they are part. This means that information about the context, the process, the products and the impact of their actions should be made available and accessible to them. It also implies that information or knowledge arising from other similar cases should be made available to them. People, the internet, databases, documents, facts and figures, information about new trends in disciplines or areas of work (domains), legal requirements, criteria used by inspectorates, critics, or media, etc. may all add to this learning environment. It means that self-evaluation involves information not only about one’s own practice, but also adds to the knowledge of the wider context, as a comparative frame of reference.

To understand progress and to be able to assess the impact of their activities, it is vital that educators know in which context they operate. Aspects such as legal requirements, strategic decisions, financial aspects, values, history and structure of the organisation may be relevant contextual factors. For example, the presence of voluntary workers in the organisation will have an impact on the results of the self-evaluation and the relationship to the learning process. It is only when an awareness of this has been established that it does become meaningful to register, monitor, analyse and value information about one’s own work, its results and the impact these have on the organisation. The self-evaluation processes may take place at different levels and stages in the educational process. These different levels and stages may relate to the actual learning processes, to the teaching processes, to the programmes implemented, to the organization, to the leadership and management, to external communication and to the external wider context such as the local community.

It is important that the evaluator knows and understands the context and work environment. It is especially important in informal and non-standardised educational organisations that the evaluator agrees with the aims and objectives of the organisation and is able to situate the organisation in a wider social context.

INTERACTIVE SELF-EVALUATION

Information has no meaning; knowledge does. The process of adding meaning is the result of inner or outer dialogues relating to the information gathered. Therefore we consider the process of engaging in dialogues relating to work an essential element within self-evaluation.

In the adult learning education, learning is approached as a process in which dialogues are central. If self-evaluation is approached as a learning process, dialogue will be an important part of it.

These dialogues may have different features. Self-evaluation is concerned with understanding the dynamics of one’s work, so it involves exploration of the situation and the factors influencing the work situation. Understanding the resulting information will only be possible if this information is linked to mutual experiences. In addition, self-evaluation also involves values, so it will be a matter of negotiating with

others. At times, this may lead to debates and sometimes disputes.

Dialogue will ensure that there is not only a scrutiny of the superficial effects of processes but a further investigation of values. Self-evaluation deals with matters of difference between conflicting interests and opinions, so it is partially regarded as a process of negotiation. Thus dialogue is used to mediate and explore the educational context, processes, results and impacts, and/or the innovation and development processes within the organization. Dialogues are vehicles for learning. The variety of dialogues determines the richness of the learning process. The more interaction and the more perspectives, the better and the deeper the learning processes.

A REFLECTIVE PROCESS

Self-evaluation is a process of learning which is highly interactive and reflective. From various sources and from various perspectives all the people involved seek feedback. In this way, they establish a clear and inter-subjective understanding of both the context and the impact of their own role in the process. By gathering data and by analysing it, people provide themselves with feedback on their own performance and progress. In addition to this so-called “auto-feedback”, there are other possibilities. Peer feedback is a strong mechanism to help people learn from experience. This is also true for “360 degrees feedback” provided by those in different positions and at different levels in the organisation. This can include feedback from superiors, subordinates and people in similar positions. The 360 degrees feedback provides insights into the dynamics of one’s work within the structure of the organization. Reflection relates not only to one’s work with colleagues and superior or subordinate staff, but also to multiple interactions with students, clients, stakeholders, sponsors, funding agencies and the community etc. Reflective practice involves a wide variety of people. By means of interaction and shared analyses of the educational process, the context, effects and impact of the feedback is highlighted and promotes learning among all parties concerned.

Feedback on the work done may be either instantaneously or over a longer term. Instantaneous feedback may be given in relation to the learning outputs and the products developed. However, education also has long-term goals. Career development, access to work, organizational change, personal well-being, community benefits etc, may all be among the intended effects. Furthermore, processes are often intended to have long term impacts on a variety of contexts and stakeholders. This dissemination effect or impact may also be included in the self-evaluation process.

In relation to this, we should consider the competencies linked with the implementation of self-reflection. Pivotal is the 360° feed-back and the extent to which the evaluator intends to share his results and experiences with others. In order to reflect, insight is needed from colleagues in a range of different positions throughout the organisation. The extent to which the evaluator is able to build an image of the subjective information contributed by all the individuals in the organisation will determine the objective choices to be made later.

VIII. ORGANIZING SELF-EVALUATION AS A DIALOGUE

Self-evaluation, we stated, requires a rich environment which is interactive and reflective. We also emphasised the importance of self-evaluation as a dialogue. There are several reasons for this.

First of all self-evaluation itself may be considered a dialogue. It concerns a dialogue, explicitly or implicitly, between educators and learners, between organisers and target groups, between funding bodies and providers, between providers and the community etc. It is partly an internal dialogue among all people involved within an educative initiative, or within an organisation. Beside that it is also an external dialogue with the outer world which includes funding agencies, authorities, the community, employers, etc.

Secondly, since we consider self-evaluation to be a learning process, it involves dialogues which support interactive learning. Here learners explore their experiences with others and share their views.

In the following diagram we introduce the role of dialogues in the concept of self-evaluation as presented earlier in this document.

Self-evaluations which do not involve interaction in various kinds of dialogues are one-sided, and what's more they are poor learning experiences.

It is important to realise that for learning purposes these dialogues have to be exploratory. The participants in such dialogues share their perceptions and try to find explanations for the particular course of events. However self-evaluation also serves other purposes e.g. marketing, accountability, trouble shooting etc. Such purposes also require dialogue.

We should also distinguish between two main categories of dialogues - dialogues among partners and dialogues between parties. Each category is explained below:

DIALOGUES AMONG PARTNERS

Accumulative dialogues

Casual talk in which every day experiences and events are mentioned by participants, both to share them and to get to know each another without going in too much depth;

Exploratory dialogues

To explore how things are, how they proceed, how they work, common practice etc.;

DIALOGUES AMONG PARTIES

Persuasive dialogues

To convince others, not to overrule them, but to make them change their minds;

Disputation dialogues

To make your point, to prove your case, to defeat the opponent;

Dialogues of negotiation

To state positions, to discuss the relative weight of arguments, interests and advantages, and to reach a kind of agreement on how to deal with it all.

Within self-evaluations it is of vital importance to be aware that most dialogues fail because participants implicitly disagree on the kind of dialogue they are in. If someone tries to convince the other party of a viewpoint, while the other party is thinking that he or she will merely share some thought to explore a situation, a conflict may arise which can unintentionally turn the whole dialogue into a dispute. That is why awareness of the categories and the inherent behaviour is important. In many self-evaluation processes misunderstandings and arguments are caused by miscommunication about the kind of dialogue in which the participants are engaged.

That is why it is important to:

- be explicit about the general goal and about the kind of dialogue you expect;
- identify the intended outcome of the dialogue;
- decide on the roles and the procedure;
- agree on the duration of the dialogue.
- be aware of and act according to the rules of the dialogue chosen.

KINDS OF DIALOGUES	SPECIFIC RULES
<p>1. Among partners</p> <p><i>Accumulative dialogues</i> Casual talk in which every day experiences and events are mentioned by participants, both to share them and to get to know each another without going in too much depth;</p> <p><i>Exploratory dialogues</i> To explore how things are, how they proceed, how they work, common practice etc;</p>	<p>Ask informative questions Add own experiences Give new information Accept the information given Don't comment other than positive/affirmative</p> <p>Ask inquisitive questions (how, why, etc.) Try to explain your assumptions/motives Analyse differences and similarities Formulate new hypotheses Make an inventory of shared ideas and optional ideas</p>
<p>2. Among parties</p> <p><i>Persuasive dialogues</i> To convince others, not to overrule them, but to make them change their minds;</p> <p><i>Disputation dialogues</i> To make your point, to prove your case, to defeat the opponent;</p> <p><i>Negotiation</i> To state positions, to discuss the relative weight of arguments, interests and advantages, and to reach a kind of agreement on how to deal with it all.</p>	<p>Make clear whom you are addressing Show empathy Explain the possible views Specify your choice Explain your position as well as indicate your doubts Listen Show some vulnerability Acknowledge the inputs given Reformulate your own view</p> <p>Identify who your opponents are (Identify who your audience is) State your position but include "exchange" Summarise your position briefly Summarise the opinion of your opponent Don't ridicule you opponent (Address your audience directly) Make explicit that you have included some elements from your opponent's views</p> <p>State clearly the positions at stake Formulate your position strongly Identify differences of position and of interest Show and emphasise the advantages of your colleague's views and the disadvantages of your own Don't push your position Be prepared to move towards the other view Take time to think things through and don't act impulsively</p>

2. A FORMAT FOR PLANNING SELF-EVALUATION

In the SEALLL project the focus is on evaluations which promote learning.

Evaluation is often seen a retrospective activity. However, this does not imply that evaluation only occurs after a process is completed. An evaluation may well take place at any of the stages within the project, programme or initiative. It may include needs assessment, organizational diagnoses, curriculum evaluation and assessment of learning outputs.

Furthermore, it may refer to various kinds and levels of processes. It may be an evaluation of adult learning, of adult education, of the organizational processes, of innovation processes or of communication processes within the environment.

Explicit evaluation

In discussing evaluation it is possible that evaluation activities have already taken place but they are often not identified as such. We consider it of vital importance that evaluation is an integral part of work, a program or a project. We would also like to emphasise that evaluation requires on-going effort. Gathering data and processing is a base-line activity, but analysing the data and reflecting on it represents significant development above the baseline. The analysis of data, sharing perceptions and opinions, searching for meaningful solutions, innovative ways of following up and a reflection on the value of the processes studied and lessons learnt, both individually and collectively, all take energy. The extent to which the evaluation will be seen as a learning process may be influenced by the time used to implement it. A group discussion for example, may take much more time than a questionnaire. However, the learning impact might be far greater.

The time needed for evaluation and reflection, requires that specifically designated moments are included in the institutional diary or in the planning of projects. This time investment can only be acceptable if the results are then translated in concrete actions and if they contribute to innovative actions for the organisation.

Who is 'the self'?

For an explicit evaluation it is vital to be clear about who is the self in the process of self-evaluation.

The self can be either one person, or it can be a group of people, a unit inside an organisation, or an organisation as whole. It is important to define who the self is, so that responsibilities and competences may be allocated at the start of the process. An example is given below. It will be further elaborated later in this chapter . This example is introduced as a general support for the reader to understand the newly introduced concepts. It is in no way exhaustive.

Example: In a Local Learning Centre a group of adult educators wishes to evaluate its own courses. Ambiguous reactions from both the learners as well as from some other stakeholders have made them curious about what it is that explains these various reactions, some of which were really negative. The course which provoked these reactions is one for unemployed people searching for ways to re-enter the labour market.

Agreements

In relation to the explicit promotion of the results of the self-evaluation, there must also be agreement on the choice of actions and decisions to be implemented. Self-evaluation can only give rise to meaningful information if the organisation is aware of, and understands all organisational factors and influences, and the relationship these have between them. To ensure a truthful self-evaluation, it is important to respect the privacy of participants, their ideas and their inputs.

It is important that the organisation declares the respondents to be the owners of the data given. Therefore data cannot be transferred or revealed to others beyond the audiences agreed upon by the participants.

Before starting the self-evaluation the trainers agree that the evaluation may lead to changes to the programme, because it may affect the course content, as well as the methods used. The evaluation, however, is not meant to decide on whether to continue offering these courses. Continuation is not an issue. The courses will be provided in future.

Levels of evaluation

If organisations, or participants in a project, decide to undertake the process of self-evaluation, they need to be aware that evaluation may be focussed in a range of different areas or one selected area. For example, they may choose to focus on learning activities, or on management issues. To give an overview of options we would like to distinguish between various levels of evaluation. It is helpful to be aware of the levels from which to select. They may be combined.

ISSUES TO BE EVALUATED

The issues of the evaluation may be divided into “level-linked” and “non-level-linked” issues. The list of levels may be considered as shifting from a classroom focus towards a more organisational/society focus:

- Learning;
- Teaching;
- Curriculum/programme
- Curriculum/programme development;
- Professional development;

- Organisation and management;
- Leadership;
- Organisation development;
- Broader social context.

The organisation should not forget that the evaluation of level-linked issues must happen in relation to other levels. For example, the evaluation of teaching issues cannot be implemented without linking it to professional development, overall strategy and the context of the surrounding community.

Apart from levels of evaluation, one may also seek to find another way of focussing. This relates to the non-level-linked issues. As examples of alternative focuses for evaluation, we mention a selection known to us made from existing and former projects.

- Equal opportunities;
- Self regulated learning skills;
- Multicultural issues;
- Creative approaches;
- Levels of performance in subjects;
- Employability.

In projects or activities, one cannot evaluate everything. It will be necessary to focus, either from the start or to focus progressively while evaluating (“zooming”). It is important to make very clear choices at the start of the evaluation process: either select several issues in one level, or one issue from several levels. Be wise: prioritise!

The reason for self-evaluation has been the fact that comments, not all too positive, have been heard from various sources. The focus of the self-evaluation of the courses for the unemployed will be on the way in which the trainers challenge, permit or stimulate the learners to be explicit about their needs. The overall impression is that maybe the course offered has been still too trainer-centred, and not sufficiently responsive to the needs of the learners and their individual labour market perspectives.

GOALS AND RELATED INDICATORS

Once both the level and focus of evaluation have been identified; one has to be specific about the goals of the evaluation e.g.

- Improving a current project ;

- Learning (individually or collectively) to prepare for future initiatives ;
- Personal learning and professional growth;
- Sharing findings and making them more transparent for democratic purposes;
- Finding the explanation for arisen problems

It is also important that goals are identified and continuously followed. The target group, the method and the information needed will have to be chosen in relation to the goals.

To be able to monitor the progress each of these goals will need some indicators. If the target is, for example, passing on competencies, the evaluator will need to indicate which competencies, to whom, and within what time frame?

The goal of the self-evaluation is to improve the responsiveness of the courses for the unemployed and to raise the competence of the trainers in dealing with the heterogeneous needs of the learners attending the courses.

TARGET GROUP(S)

Evaluation may serve different audiences/target groups. How evaluation is implemented and how it is reported, depends on the target group identified. It is therefore essential to know in advance who is expected to benefit from the evaluation. Identify your choice using the following list, again not exhaustive:

- Yourself
- Colleagues
- The whole staff
- Learners
- Local authority
- Inspectorate
- Related agencies
- Sponsors, funding agencies
- The wider community

The evaluation as envisaged by the trainers offering the course for the unemployed is merely both to improve their own performance and to reach a higher level of satisfaction among the learners as well as among the potential future employers involved.

INFORMATION NEEDED

Often evaluation focuses on perceptions only: In our view it is very important to make a distinction between

1. describing how things went;
2. identifying the context in which it took place;
3. describing the process in relation to particular indicators;
4. identifying the outputs;
5. developing an inventory of opinions relating to how things developed the way they did and relating to the value for the project, the programme or the school

In order to use these categories it is important to distinguish between data about:

- intentions, expectations and plans;
- facts, figures, and tangible products;
- norms and values of those involved;
- judgments, opinions and evaluations.

- Information is needed on what is included in the course programme;
- More information about the actual course of events during the courses is needed. Who is attending, what are their backgrounds, what is known about the kinds of work they would like to find, what activities are they engaged in, what training activities took place, what methods were used, what responses have been observed/ registered, etc.?
- What comments did the participants make during the course, or during specific evaluative talks?
- What do you, the colleagues, and the employers think about the course of events shown in the data mentioned above? Do they feel it is good, effective, and worthwhile?
- Examples of explicitly focused activities on specific needs together with positive feedback from both learners and potential employers can be considered to be evidence of good practice.

METHODS AND INSTRUMENTS OF EVALUATION

Various methods and instruments may be used for gathering the information needed. We will mention a few of them here and give a brief explanation on each:

- *Questionnaires*: list of questions to be asked to respondents;

- *Observations*: evaluation data may be gathered by observing the behaviour of the participants e.g. teachers, students, others. Identify carefully which behavioural traits should be observed and what meanings can be deduced from these;
- *Interviews*: oral questionnaire, either structured semi-structured or open. Interviews may be held individually or with groups;
- *Meetings*: meetings stimulate people to reflect on things and to discuss them. While doing so evaluation implicitly occurs;
- *Snowballing/Delphi*: people may be asked individually what they think of particular things, but it is certainly illuminating for them to hear or read what the same things meant for others. By making a list of the issues raised, or of opinions given, the opportunity is created for others to comment. In this way an overview is created of possible opinions and the support for each of them;
- *Written product*: writing about one's experiences is a powerful way of reflecting;
- *Presentations*: telling others what happens in your school or in your project forces you to reflect on this as well. This is also occurs with the critical questions which may be raised by your audience. Again this method can prove to be a powerful stimulator for learning from experiences;
- *Flowcharting*: by describing the process of a course or training session using a "flowchart" diagram, it will be possible to reflect not only on the different stages of the process but also on the link between the different stages;
- *Critique/reviews* by internal or external experts/colleagues. Inviting others to come and give their views on what they perceive to be happening in a project, at the school or in a programme is a positive way of triggering an internal debate about quality;
- *Unobtrusive measures*: some data may be gathered without requiring assistance from other people. How often do students visit the library? How many parents come to meetings or answer correspondence? Recording secondary information such as the speed at which the chairs in the study room deteriorate will determine the intensity with which the room is used.
- *Reports/minutes*: Some documents are produced even if no evaluation takes place. Nevertheless they may have a function in an evaluation and support the reflective process that evaluation should trigger. Furthermore the data in these documents may be considered as material for further analysis.

NB. More about instruments is included in a specific section on tools for self-evaluation included as

chapter 5.

In the example situation the available course materials will be analysed.

It is decided that trainers will keep a log of the course, to allow them to reconstruct what actually happened.

Trainers will have evaluative talks with their groups in the early phase, the middle and at the end of the course.

The team leader responsible for the whole course will phone current and potential employers to ask their opinion on what is offered and how it works out.

In order to analyse and discuss the facts found, the method of flow-charting will be used. This method allows everybody to have an input. It has a visible and traceable output and it visualises the insights gained from the analyses. Thus it has a professionalizing effect on all people present.

ORGANISATION OF THE EVALUATION PROCESS

During evaluation activities, the participants and impact stakeholders may all have different roles. This is why evaluators should consider how the evaluation will be organised and how each person should be involved. Several roles may be considered:

- Member of the evaluation committee
- Respondent
- Member of the “audience”, beneficiary or impact stakeholder
- Evaluator
- Critic
- Stakeholder/representative
- Data processor
- Reporter

Two trainers manage the self-evaluation one of whom is the course leader

All trainers (4) have executive tasks in the self-evaluation by keeping their logs and having the evaluative talks during the course.

One of the trainers of the management team does the interviews with the employers.

The two trainers in the management team analyse the logs and the summaries given by the trainers and write a draft report. This should be brief and practical.

In a plenary session three issues are discussed.

1. Do we recognise the picture derived from the data?
2. What seems to work out well and what requires improvement or change?
3. What might be done to help us achieve these changes or improvements?

INFORMATION PROCESSING

In the past, the processing of the data appeared to be the work which only medieval monks were willing to do. Therefore it is wise to prepare carefully in order to keep things as simple as possible. Choose categories to organise the responses or data collected. It is important to ensure that the process is transparent and easy. Slow processes lead to slow feedback. Slow feedback in turn is usually frustrating and perceived as useless. If feedback is only available after the event, the process often loses momentum.

The two trainers managing the self-evaluation plan how the information will be processed. This is their proposal on which later on the others agreed.

One person collects the logs and summarises them. For that purpose a checklist will be used that focuses specifically on the match between the education offered and the needs expressed by participants.

The evaluative talks with the participants will be held using a few core questions. Answers given by the course participants, after having been discussed between them, will be summarised on flipcharts.

The flip charts are typed out and turned into brief reports

The phone calls with employers are registered using a checklist. The calls together are summarised in a table showing the responses of various employers

IDENTIFICATION OF CRITERIA/EVIDENCE

Evaluators and self-evaluators must make a clear distinction between results indicators and process indicators. In the paragraph about goals and targets we explained that indicators need to demonstrate that the self-evaluation is contributing to the achievement of agreed targets. These are regarded as results indicators. We also need indicators allowing us to correctly interpret and analyse the results. For example,

in a questionnaire, if we allow the answer “not important”, this answer can be analysed in two ways: the positive answer is that it is not necessary to answer the question and the issue is okay. The negative answer is that the respondent did not have any positive experience in relation to the issue.

It is compulsory to define indicators so that only one interpretation is possible.

It is also important to identify these indicators and criteria in advance so that the discussion in relation to meanings and outcomes limits the possibility of confusing interpretations and multiple meanings. This problem cannot be solved completely, but good preparation certainly helps.

The analysis of the gathered facts and opinions will have to reveal whether it was a good course or not, and in particular whether it has been perceived as responsive to individual needs.

Examples of explicitly focused activities on specific needs together with positive feedback from both learners and potential employers are considered evidence of good practice. The analysis will have to focus on this kind of evidence.

ANALYSIS/INTERPRETATION

It is important to take care in selecting accurate indicators and criteria. Furthermore, by being strategic in selecting indicators for analysis, support for the conclusions may already be gained.

The trainers decide to wait for all the summaries of the information which has been gathered, and then to use the group discussions to find ideas on what may explain the successes and the less successful aspects of the course. The method of flow-charting will help the group in sharing their views on what may affect the success of the course. By sharing these views and by bringing them together in one common flow chart, the process of interpretation will lead to an explicit outcome which reflects the learning of all trainers involved.

REPORTING

Different audiences require different reports. Be aware of whom you are reporting to and what that implies for the format, the level of conclusions and the way priorities are expressed.

The self-evaluation of the course for the unemployed primarily is a self-evaluation having the trainers themselves as its main target group. That is why the main report will be the one that is drafted before the meeting of all trainers and enriched after everyone has been heard and ideas have been shared. It may be possible that, having had the discussion, the trainers decide that an excerpt from this big report may be informative for the learners and the employers as well. However the interests of these two groups are probably so different that it is might be better to distinguish between two kinds of summaries:-

One for the learners (*Why do we train you as we do?*)

and one for the employers (*What has been or might be done to help the unemployed re-enter the labour market?*)

DIVISION AND ALLOCATION OF TASKS

So far we have identified what is needed. For implementation to be successful, it will be necessary to agree on who is going to do what i.e. the part of the plan devoted to the identification, division and allocation of tasks.

TIME SCHEDULE

Without a time schedule, any project will fail and therefore, any evaluation will fail. It is important that the time invested in an evaluation does not exceed more than 10 % of the time invested in the development of what is to be evaluated. If there seems to be a need to evaluate even more intensively, we believe enough is already known about where improvements can be made. In such cases it is better to emphasise further development initially, and start evaluating later.

Having decided on all the issues identified in this chapter, it will be possible to describe the evaluation plan. Many readers may think that this requires an amount of preparation that is unrealistic. Evaluation has often been considered as an investment with no return, but it is important to realise that often the problem has been related to a poorly planned project or enterprise, not with the evaluation process itself. This chapter does not seek to give guidance on evaluation in great depth or to respond to any situation. On the contrary it supports evaluation only when needed. It also advocates focused, efficient and effective evaluations. A carefully designed evaluation plan may simply consist of the elements mentioned above as shown by the titles of the paragraphs (in italics).

FORMAT FOR PLANNING A SELF-EVALUATION

- Issues to be evaluated
- Goals of evaluation and related /indicators
- Target group(s)
- Information needed*
- Methods and instruments of evaluation
- Organisation of the evaluation process
- Information processing
- Identification of criteria/evidence
- Analysis/interpretation
- Reporting
- Division and allocation of tasks
- Time schedule

**Privacy agreement*

You can find lots of examples and a blank template for this self-evaluation format on the project website: www.sealll.eu

3. MANAGING A SELF-EVALUATION

This chapter consists of a long list of considerations which may be helpful for managing a self- evaluation. However long lists are seldom inspiring. This is why we recommend the use of this chapter as a kind of checklist while planning and managing a self-evaluation, rather than as a text to be read in full.

THE PSYCHOLOGY OF THE EVALUATED

Evaluation has threatening connotations to many people. They perceive it as something that may lead to criticism, or to being watched and controlled. In self-evaluation all this shouldn't be true, but it is important to be aware of this perception and to pay attention to the fears some people may have. Often these fears are not shown overtly, but rather by protests, negativism or obstruction. Self-evaluation aims at a learning process of all parties concerned and all individuals concerned. The learning process is supposed to be a self directed and autonomous kind of learning. Throughout the complete self-evaluation it will have to be clear and reinforced that this is the main goal.

Active participation, a strong emphasis on privacy matters, and leaving the analysis and the conclusions to the people, rather than imposing conclusions on them, are important ways to overcome resistance and increase the enthusiasm for evaluation

FOR WHOM DO YOU EVALUATE?

Evaluation is carried out for particular people. An institute for adult education may start a Sfor the teachers, for the leader, for the community, the inspectorate, etc. This evaluation will also serve other audiences or target groups. A self-evaluation will seldom serve only one group. However, it is important to be aware of the main target group of the evaluation. All parties concerned must know that too. It determines what can and what cannot be revealed. It touches on the privacy matters already mentioned, and as such it affects the level of commitment or fear of the people involved. To manage an evaluation well it is important that one is aware of and explicit about for whom it is done.

KEEP LEARNING IN MIND

Evaluations serve as feedback both to the individual and collective learning processes. This does not happen automatically. For evaluations to contribute to this learning, this should be made explicit. It was stated earlier in "the Evaluation Framework" that evaluation takes something extra. It takes time for reflection. If this time is not taken, if there is no explicit answer to the questions "*what have we learned and what this implies for our future perceptions, opinions and actions?*", the learning results will evaporate. Trainers know that learners benefit from an approach in which the learning content is announced, is presented and is summarised. This same three step procedure is important in managing a learning focused evaluation. Direct the attention, carry out evaluation activities and then direct the attention again to the insights provided by the evaluation. After that the implications for further decisions and actions may be considered.

MONITORING VERSUS EVALUATION

Evaluation can easily turn into a lot of work. The processing of data and its analysis may take considerable time. It is important to try to avoid this. This confirms the importance of the distinction between monitoring and evaluation. Monitoring is merely recording things e.g. keeping a file with data on progress made, presence or absenteeism, drop-out numbers, number of meetings/sessions/classes cancelled, information sent to stakeholders etc. This may all just be filed, not in order to analyse it all in depth, but to be ready when there is a reason to do so. Monitoring provides the organisation/initiative with a database which may be analysed if problems occur, or complaints are made, or when significant successes cannot be explained satisfactorily. Evaluation is more than just registering the process. It includes the analysis and the valuation of things. It is better to focus and prioritise as much as possible within the evaluation, so that it does not turn into something too complex, and at the same time not to limit the monitoring too much. Registering and filing things does in fact provide educators with a rich opportunity for learning at moments of their own choice.

GIVING AND GAINING SUPPORT

Evaluation is a matter of systematically forming and underpinning opinions and/or personal theories on the course of events in the educational setting in which one works or acts. These processes are dependent to a large extent on the perspectives of the various parties concerned. It cannot be denied that there will be a lot of possible conflicts of interests. There will be majorities and minorities in these matters. In order to keep evaluation as a challenge for everybody involved, it is important to find a balance between finding support for some views and giving support to others. Thus, one might create a mix of initiators i.e. the ones whose views you support, and followers i.e. the ones whose support you have gained to fulfil these roles interchangeably. By managing an evaluation in this way, any polarisation or frictions between the conservatives and the *avant garde* will not unnecessarily be enlarged.

TASK IDENTIFICATION AND DIVISION/ALLOCATION

Someone ought to do the dishes. In households it is known that this sentence is not enough to lead to action. For such a message to be effective, it must address a specific person. This is true in dish washing, as well as in evaluation. For the evaluation process to be manageable and efficient, the task must be identified, made explicit, allocated to particular people, estimated in terms of time and included into the planning and schedules of peoples' regular work. This is something many evaluators failed to realise. One might say: "*Evaluation will not be taken seriously, if it is not taken seriously!*". It will not lead to action, if no one is appointed to do something with it, and informed about the requirements on how and when it is expected to be done.

DEALING WITH REPRESENTATIVES, DECISION MAKERS, STAKEHOLDERS, TARGET GROUPS, PARTIES CONCERNED...

It is obvious that among everyone who may be involved in evaluation the need for information will vary

tremendously. Representatives want to have their interests served, the right to vote, or a proportional influence; decision makers would like to be able to make choices between alternative actions such as *yes/no, go/no go, this way, or that way*; stakeholders have the right to know, they wish to be informed. Other parties concerned may like the evaluation to contribute to their own positions in processes of negotiation on particular issues. These people all have different interests, value positions, access to information, needs and so on. As a consequence the nature of their involvement will have to be different. In order to manage evaluation well, it is important to allocate the evaluation tasks in such a way that there will be no role conflicts or incompatibilities between the group of which one is a member and the evaluation task one is charged with.

INVOLVING PEOPLE AS EVALUATORS, RESPONDENTS, DATA COLLECTORS, ANALYSTS, EXPERTS, REPORTERS...

What kinds of involvement do we distinguish between? A number of ways to be active in the evaluation are mentioned in the title of this paragraph:

the evaluator is the one forming an opinion based on the analysis of the issues studied; respondents are just being heard; data collectors administer interviews or questionnaires or serve as observers; analysts go through the data to identify the meaning of the data; experts are free to give their views from the perspective of their particular field of expertise; reporters make the process of evaluation and its conclusions accessible to the various audiences.

In a self-evaluation it is important to try to have a high level of participation. It is vital to see to it, that a deliberate choice of roles will be made to involve the different members of the educational or wider community in the tasks which suit them best, both from a perspective of expertise, and of interest. The challenge is to find the right match between the kinds of involvement mentioned in the previous paragraph and the tasks mentioned in this one.

REPORTING

Different groups have different frames of reference. They all have their interest positions with their specific interests and allergies. They have their different levels of schooling or experience in school matters. They have their needs for different kinds of information. These are all reasons why producing the same report for different audiences often doesn't work. Sometimes the differences in needs may be addressed by preparing the report in such a way that it consists of elements that go more or less into the details. An executive summary, followed by an account about what was done and the conclusions, could then be followed by a more detailed report on the implications for the various actors in the school and finally by appendices for those who wish to know the details. However, sometimes, having different reports for different groups cannot be avoided. The management of the evaluation may all be in vain if this part of the process is not carefully addressed. It often is a delicate matter.

ETHICAL ISSUES, DEMOCRACY, PRIVACY, EQUALITY, EXPOSURE,

Not only reporting is delicate. The whole evaluation includes lots of matters which must be taken seriously because they involve ethical issues, or basic values.

It is essential to reach very clear agreements on the rights of all the parties involved in or affected by the evaluation.

We recommend being as explicit as possible about

1. The ownership of the data;
2. The accessibility of the data to others;
3. The way things will be made public;
4. The way the evaluation will deal with anonymity, or not;
5. The possible consequences of the evaluation for the positions of individuals, their tasks and responsibilities.

INTERVENTIONS AND METHODS TO BE USED IN THE EVALUATION PROCESS

The person responsible for managing the self-evaluation, will have to organise a number of meetings during the process of evaluation. Since evaluation is basically considered a process of adult learning, the opportunities for participants to share thoughts and sharpen their views in discussion, put feelings into words, and make the positions and the relative minorities and majorities visible are essential for success. For successful learning to take place, evaluation meetings must be:

- motivating;
- offering a richness of perspectives, data and options stimuli;
- giving opportunities to explore, revise, attune ones views and experiences;
- providing a clear picture of what has been the result of the reflections;

This all implies that evaluation must be a challenge: it should be stimulating, highly interactive, a mix of divergent thoughts e.g. brain storms and convergent debates e.g. focused decision-making.

4. EVALUATING A SELF-EVALUATION

The terminology used in this chapter may strike the reader as scientific and ideal - typical. The idea behind the text is that it provides the self-evaluator with a series of indicators which determine the quality of a self-evaluation. Reality is not always our best friend, so in reality we may have to compromise, be pragmatic or just ignore a few things. That does not imply that we cannot at the same time be aware of the limitations that self-evaluation can place on our ambitions. Try not to be frightened off by the criteria. Just be aware of them, and if necessary enjoy ignoring them

OBJECTIVITY/INTER-SUBJECTIVITY, REPRESENTATION

Many authors in the field of evaluation state that evaluation is not so much a matter of providing proof that something is working as a matter of making that proof plausible. The methodology available is not sufficient to deal with the complexity of evaluation issues. The number of variables involved, the external factors influencing the objectives of the evaluation, the interaction between all those influences, and the relatively small number of respondents or cases, often make it impossible to provide full proof. Evaluation is done to gain as much understanding as possible of the things which are going on, and the effects they have, but time and resources inevitably limit the process.

This is more than a footnote. It implies that one has to be very much aware of the data one may collect in an objective way. Furthermore when objectivity is at stake, there is always the solution of inter-subjectivity. If we have no alternative strategy, we may decide to ask a number of people and to see what most people give as their judgement on a particular course of events. In practical terms this means that instead of just using data, one can also rely on a panel of judges, a kind of jury.

In creating a panel or a jury it is vital to look at the way in which such a jury represents the community involved. There is not one way of doing this. However, it will be clear that it has to be a deliberate and conscious decision, taking into account for whom the evaluation is meant, and the goal of the evaluation.

VALIDITY (CONSTRUCT VALIDITY AND EMPIRICAL VALIDITY)

What is evaluated? Often it seems obvious, but once the discussion about it starts, it appears that different actors have a different understanding of the issues and the concepts under evaluation. Validity is about that. Basically it concerns two major questions:

what is it that we would like to measure/identify/ understand?

Is what we are measuring / gathering information about, indeed what we want to know?

An attempt to answer the first question will always involve finding good and shared definitions of concepts, and then finding a theoretical framework to which to relate them. This may look quite complicated and rather scientific, but it is not necessarily so. It just means you have to be clear about what you think is important and why you think this. If this is not clear, it will not be possible to interpret the eventual outcomes of an evaluation. There must be a kind of initial idea or aim with which to compare the eventual outcomes.

New knowledge has little meaning if it has no relation to existing knowledge. If this relation is lacking, some superficial learning may take place, but the transfer of experience to other areas of work or study will not happen.

Instruments made or chosen and the debates held about the data, will always have to be looked at critically. The central questions will have to be asked over and over again: Is this what we think the evaluation is about? Is this showing us what we wanted to know, irrespective of whether it is positive or negative information? Sometimes it is useful to appoint a kind of devil's advocate to ask these questions.

INTERNAL CONSISTENCY OF THE EVALUATION ACTIVITIES

The idea behind the evaluation framework is that all the elements in an evaluation plan are derived from each other, and have great coherence and internal consistency. However, this quality can be easily jeopardised by events during the evaluation. Someone can be appointed to keep an eye on this. The steering group or evaluation project team could allocate this task to one of the members.

Basically the key questions are:

- Is what we are doing still according to the goals of the evaluation?
- Do our methods still support our learning?
- Does the evaluation support our autonomy?
- Are we still doing justice to our intention to involve different parties?
- Is our evaluation serving the right target groups?
- Are any revisions needed?
- Are these revised plans still internally consistent?

EFFICIENCY

This aspect of an evaluation is probably a very obvious one. It comes down to cost-benefit balance. Are we doing what we can, to reduce the investment of time in executing the evaluation, and yet to provide worthwhile outcomes? We will just give a few examples of items to consider in evaluating the efficiency:

Is it necessary to involve as many respondents as we do, or can we work with samples?

Is the method chosen for data gathering i.e. Interview, questionnaire, observation etc. efficient?

Have we chosen a sensible amount of detail in our instruments, analyses and reports?

We have often noticed people trying to get information simply because it was there, not because it was necessary. Evaluation easily turns into something far too big, so it is better to be cautious and keep on asking the efficiency question while proceeding. We must realise that efficient evaluation gives quicker answers.

By doing so, the evaluators serve the learning processes of the people involved more effectively. Efficiency

definitely is a quality! Quality, not quantity, is what matters.

EFFECTIVENESS IN VIEW OF THE GOALS OF THE EVALUATION

Often evaluations are quite sophisticated and involve lots of work. Often however they produce a lot of materials, but ignore the real answers to the questions posed. Reaching conclusions at the end of an evaluation can be highly frustrating and can kill any enthusiasm for learning from the experience. This is why it is so important to identify some intermediate results we wish to accomplish during the evaluation process. This gives us the opportunity to raise the issue of effectiveness at an early stage in order to avoid eventual disappointment.

- How much of what we want to find out have we revealed so far?
- How does that compare with what we intended?
- What can we do to raise the effectiveness of our next step?

Some people think that the inclusion of such meta-evaluation elements in the evaluation goes too far. They fear it will cost too much time. However, reflecting on the effectiveness together with the efficiency will often save more time than it costs.

TRANSPARENT EVALUATION

Two basic assumptions serve as the basis for our evaluation approach. The first is that evaluation is an element in processes of individual and organisational professional learning. The second is that it will clarify interest positions and serve as a basis for negotiation among all parties involved.

Thus it serves both learning and democracy. For both purposes the process of self-evaluation should be as transparent as possible.

EFFICIENCY AND EFFECTIVENESS AS A LEARNING PROCESS

The special focus in the approach chosen is learning as the ultimate process. Evaluation should contribute to this and be supported at the same time. Because of the importance of this element in this approach, we must focus on this aspect once again. From this perspective good quality evaluation has following characteristics:

1. Good self-evaluations are motivating events:

- They include a variety of activities;
- They have clear goals and purposes, known and supported by the people involved and concerned;

2. They provide the people involved with a richness of information or experiences from which they can benefit:

- Lots of sources;
- Clearly structured information;

- Involvement of all the senses
3. They provide opportunities for exploration, articulating ideas, experimentation and feedback on these experiences:
- Opportunities for brainstorming;
 - Opportunities for thinking;
 - Opportunities for discussing and sharing ideas;
 - Safe and secure feedback on initial “theories and actions”, meaning that there is feedback on how the facts found are related to what people originally did or thought, or both.

5. SELF-EVALUATION TOOLS

In this chapter tools for self-evaluation are mentioned and described. In the annexes at the end of this publication you will find a more extended series of examples of tools for self-evaluation.

KINDS OF TOOLS (CATEGORIES)

Evaluation may be done in many ways and using a variety of instruments and methods. Many of these instruments and methods already exist, but in order to fit a particular need these methods and instruments or tools often have to be either newly developed or revised. Nevertheless it is a good first step to see if instruments are available which match the needs of those who wish to evaluate their organisation, programme, team or project.

No matter which tool one wishes to choose, the underlying thought will be some sort of list of things one wishes to know. This implies that there will be always a kind of questionnaire behind any evaluation activity. In order to find answers to the questions included in such questionnaires, many options are available. These options include:

- Questionnaire;
- Interviews;
- Checklists for observation;
- Checklist for document analysis
- Other methods

INTERVIEWS AND QUESTIONNAIRES

In order to develop or choose a questionnaire, it is helpful to develop a kind of mental map of the thing you wish to evaluate. This implies that a map is made in which all the related factors, influences, concepts, actors, and their interrelation are drawn. From such a map it is possible to derive the main questions one wishes to ask. It reveals the blanks, the doubts, the convictions, and the closed and the open questions one has in this field of "study". Based on this inventory, it will be possible to set priorities and to decide which questions have to be included in an instrument. There is always a lot more to be known than one can possibly evaluate, so it is important to be as selective as possible in choosing the items to be included.

In formulating the questions for a questionnaire or an interview, many pitfalls are present. Pay attention to the risk of posing:

- Leading questions. (Do you agree that the school leader is the cause of all the problems?)
- Questions leading to a bias given the position of the respondents. (Do you think the work load is too high in this school?)

- Questions evoking politically correct answers. (Do you invest your energy in students no matter their background, their looks, or their socio-economic status?)

Whenever you want to use questionnaires or interviews as tools, do have a try-out first in a brief pilot exercise. During this period, you will be able to identify the sources of misunderstandings and pitfalls. First ask a colleague to comment. Comments gain value, if they are based on actual experience, so ask if they will allow you to administer the tool to them. Then have a dry run, with someone of the target group.

The matrix below shows some considerations for choosing either closed or open questions to be posed either orally or in written form. This is far from exhaustive, but it gives a basis for choosing an adequate instrument.

	OPEN QUESTIONS	CLOSED QUESTIONS
INTERVIEW	<ul style="list-style-type: none"> • To gain insight and understanding • Administered among a relatively small group of people • To form ideas to serve as basis for further investigation 	<ul style="list-style-type: none"> • To be able to choose between, or select solutions, options, actions • To be used for small to medium sized groups of respondents • To reach decisive conclusions or to identify clear options for a further survey
QUESTIONNAIRE	<ul style="list-style-type: none"> • To gain insight and understanding • To get a picture of the support for particular ideas or experiences • To be administered among medium size groups of people • To form ideas to serve as basis for further investigation 	<ul style="list-style-type: none"> • To be able to choose between, or select solutions, options, actions • To be used for large groups of respondents • To get a clear picture of majorities and minorities supporting the issues raised • To reach decisive conclusions

OBSERVATION AND DATA COLLECTION

Based on the same kinds of questions, it may be possible to identify actions to be observed and data to be collected. If you would like to know the level of participation of learners during classes/meetings; or you would like to know the drop out rates at a school; or the proportion of time trainers devoted to lecturing and other more interactive methods, it is possible to gather this information through collection or observation.

In order to make observations a reliable way of gathering information, it is necessary to define clearly what you are looking at. There are many excellent books available on how to develop observation schemes properly. It is beyond the scope of this document to provide lists here.

Some questions you will have to keep in mind in either choosing or developing an observation scheme are:

- What do I wish to know?
- What behaviour, or facts, do I have to observe in order to know it?
- How do I define this behaviour in terms of identifiable elements eg. visible, tangible, other?
- Do I wish to know whether things happen, or also when they happen and how often they happen?

Compared to other instruments and methods, observation is prone to be subjective unless observers make a prior effort to standardise their observation. By having pilot studies, or by having two observers independently observe the same events, you can be able to judge how suitable and reliable your instrument is likely to be.

By looking at the data and analysing it independently and then comparing the judgements, you may also see how valid the tool may be. If what you have observed appears to be related to another thing you consider as a related concept, the instrument proves to be even more valid. If, for instance, the observation of absenteeism appears to show a clear relationship with the outcomes of a questionnaire on school motivation, this supports the validity of the instrument to record absenteeism and, the other way around, the questionnaire on school motivation.

ANALYSIS OF DOCUMENTS

Basically the analysis of documents is also a kind of observation. This time the documents rather than behaviour are scrutinised. Again the main point to keep in mind is the requirement to be very concise in what you are looking for in the documents. Similar things are again important.

- Identify what you wish to know;
- Determine how this is shown in the document;
- Decide how you are going to do the analysis e.g. just a scan, or word by word?;
- Consider whether you would like to know not only whether things are mentioned but also how often, by whom, or in what context.

OTHER METHODS

The instruments mentioned so far are the most commonly used ones, but they are not the only ones others are equally valid.

- *Thermometer plus immediate feedback*; a kind of thermometer is drawn on a flipchart to indicate how participants value the event in which they take part. The flip chart is turned away from the group, and then one by one they pass by the flipchart and mark their position on the line of the “thermometer” with a board pen. You can choose whether you want to identify the dimension on which they score, or leave that open. Afterwards you turn around the flipchart so that the distribution of positions on the line drawn is visible to everybody. This may then be discussed and clarified.

- *Letter addressed to yourself*: ask people to write a letter to themselves including statements of what they have learned or what they intend to go and do with what they have learned. Then send these letters to the people involved after a certain period. It improves both their learning and the impact of the evaluation.
- *Writing an article about the project/programme*; nothing is more evaluative than to have to present the experience on paper. This requires analysis, comparisons, reflections, formulation, and articulation;
- *Presentation*; the advantage of a presentation compared to an article is of course the discussion it triggers. The dialogue that follows is one of the richest ways of learning from experience;
- *Contribution to a school or academic journal, a newsletter*: this serves a similar purpose, but now the negotiation element of evaluation comes into focus. It not only triggers a discussion aimed at understanding, but also one aimed at interests, division of power, responsibility, authority etc;
- *Creating a web site about the project/programme*: the use of new technologies adds to the quality of this instrument. Furthermore it serves a similar purpose as writing articles or making a newsletter;
- *Self-reflection instruments*: there are instruments available which help to reflect on particular aspects of your learning, educating, training, organisation etc. Issues covered by such instruments could be the school climate, the quality of a learning environment/team spirit/ effectiveness/ leadership etc. After an experiment with new methods, an instrument might be used to see what effect this new approach has on how the school is perceived or what the effects have been on the learning environment;
- *Sparring partner/critical friend*: having someone to talk to, to have debates with, to share doubts with, to share your professional kicks with, enriches the learning process enormously. As made clear elsewhere in this document, there must then be a moment when the result of this learning is made explicit and transferable;
- *Working with scenarios*: one aspect of learning is the ability to do things better in future. Developing future scenarios immediately turns present experiences into options for the future. This facilitates the transfer of what is learned, to future actions, or decisions about the future. It is desirable to develop two or three scenarios rather than one, in order to promote/trigger the dialogue that is needed to provide the rich learning context which makes self-evaluation a learning experience;
- *Critical incidents method*: reconstruct events from your experience and identify critical moments

where you had to make major decisions. Ask others to think about what they would have done in this situation. Describe your choice and compare it with the choices others have made. Identify what it implies for future action;

- *Reflective silence STAR (Situation, Time, Actions, Results)*: It sometimes is very useful to build in silences in the rush-rush, hectic race of daily professional life. Use these moments to reflect and write down what you wish to remember from the experiences you have been through. Consider alternative actions and reflect again on them;
- *Learning questions related to personal development plans*: most organisations do not have the habit of allowing or encouraging their staff to identify learning questions. If teachers, trainers, managers and others concerned know what they want to learn, they focus much better on the relevant experiences in their work and make progress. Often the learning goals and objectives of the professionals are left vague and ambiguous. This is counterproductive for effective learning and as a consequence for the organisation's quality and its ability to change;
- *360° feedback*: this is a deliberate confrontation of observations and views of a professional with the observations or views of superiors, colleagues, subordinate staff or students. The focus is on the different perspectives to which the differences in position might lead, in order to understand better the dynamics of the world in which one operates;
- *Visualising things either graphically or more creatively*: the power of images is often greater than that of words. However, this is rarely used in evaluation. Try to visualise things and make them visible, or tangible, or heard in a creative way. This will certainly create a much greater impact;
- *Debate, an adversarial evaluation procedure comparable with a trial process in court with a jury*: this method, which is very stimulating and which creates high commitment, emphasises the negotiation part of evaluation. At the same time it stimulates the motivation to learn. It may be a time-consuming approach, but it certainly makes evaluation come to life;
- *Allocating money as a token of the priorities given to different parts of the project*: dividing money clearly shows the values given to various aspects of schooling. It is a way to operationalise the value given to things. People tend to be willing to fight really hard about money. The fight over money makes it clear where people put their priorities, the debate about why and about the evidence that is what it is all about. This is what provides the learning and the clarification of the positions of all parties involved in the school;

- *Serving as a consultant in other similar projects:* actively helping others in evaluation is often a very good way to analyse your own situation. Because others want to know what your advice is, you will have to be very explicit about what you think may work out, and what you think won't. Questions will be asked about evidence and the background of your advice. Thus you will have to make up your own mind systematically.

HOW TO CONSTRUCT TOOLS AND PUT THEM TO WORK

The internal consistency of the evaluation is important. The instruments have to fit into the evaluation plan. This is why it is important to remind yourself once again what information you need.

Instruments and methods need to be clear and concise. Specifically, methods need to be transparent. Respondents need to know what is expected, why this method is appropriate, what the results may be like and how they will be used. So a published plan of action is necessary.

For instruments the formulation of checkpoints or questions needs special attention.

Make sure the items are clear and that they fit the language of the questions you wish to answer with them. It is good to think in advance how the answers will be processed. When appropriate, it is desirable to choose formats, alternative answers and scoring items that can easily be processed.

Check the instruments you plan to use for the evaluation! It is crucial to have others look at the instruments or methods to see if they understand the items and questions. This is not only necessary to improve the items, but also to gain support for the questions being asked. Taking part in the construction of instruments improves the commitment of respondents. They will be more willing to answer and to answer seriously. A trial run with the respondents very often reveals aspects or mistakes the evaluator overlooked.

HOW TO EVALUATE TOOLS - THE PILOT STUDY

We would like to emphasise again how important it is to have an evaluation of the tools themselves. In many evaluations, after having collected information, people find out that what they have got, is not what they expected. That is why a pilot is vital. A test run may reveal timely shortcomings such as:

items are not clear;

concepts are misunderstood;

it is not clear how the instrument is to be administered;

the volume of data to be collected appears to be about to create an insurmountable pack of work;

using the instrument may be more time-consuming than anticipated;

the phrases or activities proposed may cause adverse reactions amongst respondents.

6. SELF-EVALUATION OF CHANGE

Self-evaluation may either concern the evaluation of an established practice, or the evaluation of an innovation or change process. Even if a self-evaluation initially concerns an established practice, it usually leads to changes, which then makes self-evaluation part of an on-going change process. In this section attention will be paid to the kinds of phases one may go through in the evaluation of such processes.

self-evaluation must raise the awareness of people of the facts and the value of the events and course of events of which they are part. It enables people to learn about their own activities and the changes they wish to implement. It also helps them to reflect. In order to make this reflection explicit, some basic questions which people may ask themselves during a project are included in this chapter.

Diagnosis

For those who intend to reflect systematically on a project and on their own work within it, it is important to realise that an optimal way to do so, is to start with a diagnosis. A project is not good in its own right, unless it fits the needs of the situation, the learners, the teachers and other participants. self-evaluation thus starts even before anything is done. It will have to be an integral part of all the stages you and your colleagues, or you and your students/learners will go through.

Evaluation of the plan

After the diagnosis, a work plan or a plan for change has to be developed. The quality of such a plan will also have to be analysed. This follows the diagnosis and can be called the evaluation of the plan.

Evaluation of the introduction of the plan

Since you probably won't be the only one involved in a project, it is important to introduce the plan to others involved and see to it that they all understand its meaning and its implications. This means that the introduction of the plan will again have to be evaluated.

Probably you have now already begin to get bored with the notion of evaluation. Keep in mind however, that the evaluation is nothing more than a set of reflective questions you either explicitly or implicitly pose to yourself or to others. It doesn't necessarily mean a whole series of very formal measurements and analyses. It is more like asking questions such as - what is the reason for the evaluation? what you intend to do? what could be a good way to do it? do others understand what it is all about?

Evaluation of the implementation

After the introduction of your plan, you will start implementing it. Here it becomes important to ensure that things either go the way you intended, or if not, are still done in a way that, on second thoughts, still may be judged to be worthwhile. Not every change of plan is a change for the worse, is it? Often the evaluation of the implementation has to be repeated a few times until things operate the way you planned, or the way you hoped for. In the beginning new things suffer from growing pains. After two or more times these weaknesses may disappear, so then it becomes possible to evaluate the effects.

Evaluation of the results

Finally when you have completed your actions, you may well be curious to see what the results of all your efforts have been. Output evaluation may provide you with answers to those questions. Within the concept of “results” you may distinguish between immediate results such as learning outcomes; effects such as improved chances on the labour market; impacts such as improved performance, or transfer meaning effects of the performance on yourself in other settings than the one you were trained for, or even effects on the performance of other people you influence with your new competences.

In order to help you reflect on your plans and your actions, a number of questions are suggested. These or similar questions can be answered, but not necessarily to be put to others. You will be able to answer some of them yourself. You will have to ask other people about some of them. For others you will have to do some investigation. The questions essentially are meant to guide you through the thought process, you will have to go through to apply the ideas from this document effectively. The questions provided below are by no means exhaustive. Once you focus on your particular project and activities you will almost certainly want to add a few more specific questions.

DIAGNOSIS (OR SELF-AUDIT)

In order to identify your starting point, it is important to ask a number of questions about the situation, the state of affairs as it is. Having done that you will be able to set your own goals and priorities, you will know where you stand and what needs to be done.

- What is our current motivation to work on these subjects/issues?
- What is our current level of exposure to opportunities for learning?
- What are the main obstacles for the intended learning?
- How would we characterise our various learning styles?
- What is our appreciation of the project issues?
- What level of relevant skills have we already acquired?
- What we see as the main deficits and/or learning problems?
- With whom do we prefer to work?
- What kinds of learning activities do we favour?
- To what extent do we have control over various ICT skills?
- What would we like to see changed?
- What do we consider to be the strengths and weaknesses of the present situation?

- What do we consider to be obstacles or opportunities for change or improvement?
- What alternatives do we have in mind when we consider the future of our educational activity or setting? What are the options?
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EVALUATING (THE MAKING OF) A PLAN

The next series of questions are included to help you set up a plan for improving or changing your teaching / training and/or maybe that of your colleagues. The questions make you reflect on the necessary ingredients for a successful plan.

- What are the goals and objectives we wish to accomplish?
- What do we intend to do to reach these goals and objectives?
- What makes us believe these actions will be effective?
- What specific steps, what elements and what sequence of steps do we have in mind?
- Do we foresee a need for particular tools or facilities and what, if any?
- What time schedule do we intend to stick to?
- How will progress be monitored and evaluated?
- How will the plan be kept up to date?
- With whom are we going to discuss this plan?
- Who will be the people authorised to decide on the plan?
- Is it a good / a worthwhile / a feasible plan?

INTRODUCING THE PLAN TO OTHERS

You now may have a draft plan for evaluation. However, this doesn't mean that your intentions are known by others who may in some way be part of it. Those who take the initiative have a head start, so it is now necessary to ensure that these people understand your diagnosis and your plan. Therefore time must be found for you to gain their support. Questions you could ask yourself, or your colleagues, are:

- What do we already know about the issue and this self-evaluation project ?
- Can we predict the outcome of a diagnosis of this issue in your school or class?
- Given the goals and objectives of the proposal, can we suggest how we might contribute to achieving it?
- What might be the obstacles in carrying out this plan?
- What would be valid and convincing success indicators, which would enable to prove the success of this plan?
- How and when would we describe our own part in the project and its evaluation?
- Why do we think this project is worth implementing?

MONITORING THE IMPLEMENTATION PROCESS

While making the diagnosis and formulating the plan, several assumptions were made. Now that the plan is in motion, it is important to see if things appear to be the way you anticipated and to observe how your plan is being executed. At this stage it is mainly a matter of just recording what is happening without bothering too much about the interpretation. This is to guarantee that you will have this data available when you wish to evaluate the whole project at a later point in the process. Possible questions are:

- Are the circumstances or is the context what we expected?
- What is actually happening?
- What activities did we or the learners / educators / trainers do?
- What materials did we use?
- Who worked together and with whom?
- What were they or we discussing, talking about, and negotiating?
- Have any critical incidents, conflicts, highlights or complaints occurred?
- Has ICT been used? How frequently? How effectively?
- To what extent did people show active involvement?
- What progress was shown throughout the process?
- Was any support given to us and if so, by whom?
- What were the results, if any, shown in tests or assessments?

IDENTIFYING OUTCOMES

If you alter the way you teach or how you organise things or any aspect of your professional activities, at the end of the day you would like to know if it worked out the way you hoped for.

The questions included under the heading 'outcomes', are about just that - what were the results of your efforts? You will certainly have other questions to add here depending on your own priorities:

- How much learning progress was shown?
- Could any differences to be observed between various groups eg. men/women, different backgrounds etc.?
- What results of our work could be observed?
- What was the impact on us as learners / managers / teachers / trainers / educators?
- What was the impact on the organisation or education as a whole?
- What evidence of improvement do we observe?
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EVALUATING TRANSFER

So your plan has been executed for the first time. However, you would presumably like it to be repeated, or you would like it to affect others inside or outside your school or project. Hopefully it has proved to be like a stone in the water with a strong ripple effect:

- How many people have been informed about our activity?
- How many have actually been participating?
- How much interest did our colleagues show?
- How much interest did other people involved show?
- Are there any other activities or initiatives we consider a direct spin off of our project?
- What's next?

OVERALL EVALUATION

Having completed the whole project, you may now wish to look back at it and ask yourself whether it paid off. Did you benefit from it personally? What use was it to the parties concerned? How could such a project be made even more valuable?

Reflective practice is the phrase used in the introduction of this document. This overall evaluation indeed seeks to promote just that: reflection on the progress made. Looking back across the whole project, what do we consider to be:

- the most important conclusions drawn from this project?
- our own personal most important learning outcomes?
- the most important reason why people should, or should not participate in projects such as this one?

The project may now be over, but self-evaluation will hopefully become embedded in your personal and organisational ethos. Self-evaluation will become an integral part of developing, planning, organising, implementing, optimising and changing education, thus helping you to adapt to new requirements of new learners in new times.

7. MANAGING THE FOLLOW UP OF SELF-EVALUATION

CONCLUSIONS MUST BE OPERATIONAL

The self-evaluation leads to conclusions. If nothing happens after having reached these conclusions, the self-evaluation has been in vain. That is why it is desirable to be able to do everything that is within your power to see that the results, the conclusions, and the decisions made will be turned into reality. That process of making all the things you learned come true is a process which needs special attention. Many publications on evaluation show that it is especially this part of evaluation that appears to be ineffective. Books written about this have as their titles names such as: The failure of evaluation (Guba 1969), Utilization focused evaluation (Patton, 1978); Effective evaluation (Guba and Lincoln, 1981); Five uneasy pieces in the evaluation puzzle (Kirkpatrick 1998). These and similar titles show the battles which were fought to avoid the non-utilization of evaluative data and conclusions. They illustrate how important it is to pay special attention to this last part of the self-evaluative process in which things must be turned into actions, and actions must be effective.

If conclusions are formulated without being specific about what they imply, or what it takes to translate these conclusions into actions, then nothing will happen. Evaluators may be happy, but their work has been carried out for no purpose.

ALLOCATION OF TASK

Many of the conclusions reached are often widely applauded. However, agreement on who is going to take action is often not made. "*Someone ought to do something about it*" appears not to be enough of an agreement to guarantee action. For that purpose it is necessary to allocate tasks to particular people. They will have to be held responsible for doing something as a consequence of the conclusions reached, and of the decisions made.

Conclusions and decisions must be translated into action plans. These plans may be considered as innovation plans and will have to be treated as such. That implies that measures will have to be taken to make people acquainted with these plans, and support for these plans will have to be acquired. It is vital to ensure that the people concerned develop a sense of ownership of these plans.

Once all of this is arranged and established, it is possible to allocate tasks to the people concerned.

TIME PLANNING

Allocating tasks is one thing; accomplishing them is another. Once clear deadlines have been defined, scheduling all tasks into an overall plan enhances the likelihood of making things happen. Without proper planning things will remain optional, rather than compulsory. Some will say that there is no need to accomplish today what may be done tomorrow. Decisions will be taken much more easily when it is perfectly clear who is supposed to take them. This is even more effective when it is clear when the

protagonists are supposed to take them and when they are supposed to achieve the intended effects. It is obvious that the process after an evaluation must again include evaluative actions to monitor the consequences, the impacts and the transfer.

MONITORING PROGRESS

As stated in the last paragraph, the follow-up process itself will again contain elements of monitoring and evaluation. That is why this whole process is considered to be cyclical. Planning, implementation, monitoring and evaluation precede this follow-up process, which leads to refined or changed planning, new implementation, and adapted monitoring and evaluation etc. The cycle never stops. In an ever changing society with ever changing demands, needs and wishes, in a world with ever growing knowledge and technology, there will always be a place for an on-going evaluation process.

COMMITMENT

There is no mechanism as powerful as commitment and social contracts. Having to do something is one thing; knowing that others know you are supposed to fulfil them is another. To make self-evaluation effective it is necessary to make all the participants feel committed, so they feel an external drive, on top of an internal one, to meet the agreements made.

REWARDS

It may seem childish, but it is very important to reward people involved for their time and energy invested in the improvement of educational practice. This may take the form of rewards of various kinds. Rewards one could think of are:

Freedom to determine one's own approach;

Financial benefits/salary;

Mobility;

Emoluments;

Opportunities;

Perspectives;

Equipment;

Status;

Others.

In sum:

Operational conclusions allocated to particular persons that are committed and will be rewarded and that are known to be the ones to do what is agreed upon will be successful when their tasks are specified, clearly allocated and related to a perspective of specific accomplishments and forthcoming rewards.

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ANNEXES

1. A PRACTICAL GUIDE FOR FACILITATORS

Self-evaluation is not real self-evaluation unless it is self-initiated and self-regulated. However, the introduction of self-evaluation often requires some external support. Self-evaluators may evaluate themselves, individually or collectively; facilitators may be needed to help them get started, support them in actually executing the self-evaluation, and stimulate them to reflect on this process, its effects, impact and learning outcomes.

In the table below the actions of the self-evaluators are outlined on the left. The possible contributions which facilitators may make at each of the distinctive steps of the self-evaluation process are shown on the right.

SELF-EVALUATORS

ORIENTATION

Before being able to make a start you must be aware of the meaning and the potential of self-evaluation.

IDENTIFY A FEW PROVISIONAL AREAS FOR SELF-EVALUATION

It appears to be difficult to identify issues/questions for self-evaluation. Therefore it is important to consider several options before choosing a few areas on which to focus.

SHARE, DISCUSS AND AGREE ON STARTING SELF-EVALUATION.

If self-evaluation is to be a collective enterprise, it must be based on a common decision to initiate it.

(EXTERNAL) FACILITATORS

INTRODUCTION

Explain the concept of self-evaluation, its use, its philosophy, its methodology and its potential for professional growth.

DESCRIBE POTENTIAL AREAS AS APPETIZERS

Offering some examples of issues of self-evaluation may help people to specify their own choices e.g. does our approach work? do parents support our views? are students able to work effectively in groups?
etc.

GAIN COMMITMENT

Make the self-evaluators aware of the necessity of having everybody on board before starting the evaluation. Suggest formats for meetings, discussions and decision making

IDENTIFY YOUR MAIN ISSUES AND QUESTIONS.

It is important to be sure that you do not already know the answer(s) and that you are genuinely interested in the findings.

IDENTIFY DO'S AND DON'TS, AND AGREE ON THEM.

Self-evaluation may be perceived as threatening. This is why it is important to be explicit about matters such as privacy, ownership, and mutual respect.

DETERMINE AND MAKE EXPLICIT WHAT YOU FEEL RESPONSIBLE FOR E.G. ACTIONS, TARGETS, FORMATS.

The best way to make self-evaluation proceed smoothly is by identifying, and allocating tasks and responsibilities clearly and fairly.

IDENTIFY WHO WILL PROVIDE WHAT AND WHEN.

The tasks and responsibilities mentioned above may be made even more specific by specifying the actual things each participant will have to contribute e.g. instruments, data, analyses, notes, case studies, news letter, graphs etc.

CREATE OWNERSHIP / MAKE IT THEIRS / SEE TO IT THAT THE PARTICIPANTS MAKE IT THEIRS

Ask what the participants think may be the result of the self-evaluation. Different expectations and ambiguous answers add to the curiosity needed to make the self-evaluation a motivating quest.

CREATE A SAFE AND SECURE ENVIRONMENT

Provide examples of privacy statements or other codes of conduct relevant to self-evaluation.

GUARANTEE THAT THE PARTICIPANTS ARE IN CHARGE

What matters in self-regulated self-evaluation is that those who take part feel personally responsible for their inputs and their contributions. So help them produce clear overviews and divisions of responsibilities, divided according to commitment, expertise and personal preference of the participants.

HELP THEM TO DEFINE TASKS AND SET A SCHEDULE MEETING THEIR NEEDS.

Tasks, products, inputs, time, meetings, deadlines and people will have to be matched in this schedule. Everybody must agree and feel comfortable with the tasks and their allocation.

CHOOSE SOMETHING SIMPLE TO START WITH.

Self-evaluations tend to be difficult. The best way to learn how to execute self-evaluation is by starting with something simple. Keep it small and simple (KISS), as Christa Bauer puts it.

TELL OTHERS WHAT YOU INTEND TO DO AND WHEN THE RESULTS WILL COME AVAILABLE.

By making promises to others you will probably take your self identified deadlines more seriously.

MAKE OTHER RELEVANT PEOPLE PART OF THE PROCESS IN VARIOUS ROLES

A self-evaluation is more successful if more people participate. By participating, people can take part in the learning process which self-evaluation intends to establish. Taking part can be in various roles e.g. in planning or data-gathering, or as a respondent, reporter, or moderator etc.

SEEK POTENTIAL SOLUTIONS RATHER THAN JUMPING TO ONE IMMEDIATELY

Self-evaluation leads to better understanding of the “how” and the “why” of a sequence of events. Often this understanding does not point directly to one solution. Participants can make fuller use of the newly gained insights if they explore several alternative directions where solutions, enrichment or other improvements may be found.

LOOK FOR SHORT TERM REWARDS

Make it clear that a small self-evaluation gives a better chance of short-term success, and that this will provide an incentive for further self-evaluation e.g. evaluate the use of the library, the ways you monitor the play grounds during breaks or the new geography assignments, rather than the school as a whole.

INVITE THEM TO TELL OTHERS WHAT THEY ARE DOING

Stimulating the self-evaluators to promise specific documents at a particular moment creates a commitment.

PROMOTE AND FACILITATE SOCIAL CONTRACTS

Self-evaluation is a learning process. This process gains quality when more people with different perspectives and backgrounds participate. Moreover wider involvement will improve the likelihood of the successful implementation of the final decisions and policies derived from the self-evaluation.

PROVIDE VARIANTS, NOT SOLUTIONS

By offering alternative solutions or a variety of directions where improvements may be found, the facilitator activates the minds of the self-evaluators. They will be stimulated to go through the data over and over again and make up their minds about the significance of the findings. This is when learning happens.

SEEK HELP IF NEEDED, BUT STAY IN CHARGE

Self-evaluation will only be a self-evaluation, if the originators of the process stay in charge. This does not mean that no advice may be requested, or that no assistance is allowed. However, external expertise will only be brought in as support, not to take things over.

MONITOR YOUR PROCESS AND MAKE IT TRANSPARENT.

For everybody to be able to take part in the learning process which self-evaluation is supposed to be, it is important to keep track of what is going on and of the progress that is made. It often helps when the process is visualized and progress is recorded in a diagram or picture

BE OPEN TO SUGGESTIONS WITHOUT MAKING IMMEDIATE CHOICES.

Self-evaluation is in many ways a dialogue. This dialogue supports the learning process most effectively if it is of an explorative nature - a search for possibilities rather than an argument or a confrontation.

SUMMARISE YOUR ACCOMPLISHMENTS AND THEIR IMPACT REGULARLY. IT MAY ADD TO THE ENTHUSIASM FOR SELF-EVALUATION

We have already suggested that the progress made can be shown in a visual form for clarity.

PROVIDE SUPPORT WITHOUT TAKING OVER

Self-evaluators may be confronted with tasks and situations they find difficult to handle. In such situations they may seek help which you can provide. It is important to ensure that they stay in charge. Never decide for them. Just suggest possible solutions. You may only help them to carry out their choices after they have chosen a way to handle the situation

MONITOR THE PROCESS

Show ways in which the progress of the self-evaluation may be visualized e.g. time scale, planning sheets, etc. Remind the self-evaluators that the progress made refers to both the evaluation as such e.g. what have we done? and to the forthcoming learning process e.g. what have we learned so far?

FEEDBACK YOUR OBSERVATIONS

As facilitator you present a kind of mirror to the self-evaluators. Part of the dialogue in which they engage is with you. Try to keep this dialogue exploratory i.e. searching for explanations rather than for solutions. Ask inquisitive questions such as why? how does it work? what influences what? where may this lead to?

HELP THEM COUNT THEIR BLESSINGS

The learning triggered by self-evaluation goes slowly. People tend to forget what they didn't know before they became aware of new knowledge. Measures which reveal this progress and make it evident that learning is taking place

Now we must add the importance of motivation. Without regular moments for reflection and summary when participants make each other aware of how far they have come and what has been learnt so far, enthusiasm may soon drop. It is good to draw breath at times.

BEFORE THE PROCESS COMES TO A STOP GENERATE NEW LEARNING/ SELF-EVALUATION QUESTIONS.

Self-evaluation is a permanent reflective process. In order to make it a continuous and integrated part of your work it is important to refocus frequently. Once the process comes to an end, it may be difficult to get it started again.

MAKE ROOM FOR DIFFERENT INTERESTS IN BOTH CONTENT AND METHODOLOGY.

If self-evaluation is supposed to be a learning process, it requires, just like any other learning process, an awareness of the different needs of all learners involved. Some may want to learn different things from others. Some may wish to use different evaluative methods and tools. Allow for such differences. Together they will enrich the self-evaluation.

are highly motivating. Make regular inventories of the present state of analysis of both individual and collective work. Comparison of consecutive inventories should show the growth in the quantity and quality of analysis. It will also improve the motivation for self-evaluation.

SET NEW MORE EXCITING GOALS

If self-evaluation is perceived too much as a project of limited duration and with only one set of issues, it is bound to come to an abrupt end. So if you wish to establish self-evaluation as a permanent process, it is important to identify potentially relevant related areas and questions, while one is still studying the initial issues. One way to do so is to make such issues explicit and store them visibly somewhere for future evaluation. This allows issues to surface, while not interfering with the current agenda. It is desirable to start up new self-evaluation activities before the previous series of activities is fully completed.

DIFFERENTIATE ACCORDING TO INTERESTS

As a facilitator it is important that you have a clear picture of the level of learning outcomes the participants have reached. People have different needs that can only be met if their learning history is known and taken seriously. Here the facilitator has special role. Participants will often try to impose their learning needs on others. The facilitator may have an important mediating role allowing for differences and enhancing mutual understanding between with people different priorities.

NEW PRIORITIES WILL REQUIRE NEW PLANS, TO BE SHARED AND MADE EXPLICIT

Once a self-evaluation has achieved a degree of completion, new plans will emerge. It is wise to update the plans regularly so that the process of planning and gaining commitment for it gets enough attention. It is important that the process remains a collective undertaking.

DISCUSS HOW YOU THINK THE SELF-EVALUATION PROCESS IS PROCEEDING.

Learning how to learn is one of the “meta-outcomes” of any self-evaluation. This implies that it is necessary to take time to reflect on the process of self-evaluation. It is good to share ideas on how it may be done more effectively. In turn this may lead to better learning, better teaching, better development, and better processes of monitoring, improvement and change etc.

TRY TO LOOK AT HOW OTHERS FAMILIAR WITH THE CONCEPT OF SELF-EVALUATION OPERATE.

Self-evaluation may be a little incestuous in the sense that it is a process which may be too internally focused. That is why it is important to

SET NEW TIME FRAMES AND ALLOW FREEDOM

During self-evaluation new issues and priorities arise. Without either storing these new issues for the future, or including them explicitly on the current agenda, they may interfere with the current self-evaluation process. So if they are not set aside for the future, it is important to include or integrate them into the current agenda. In this way the new elements will be subject to systematic planning, task identification and allocation, and will ensure that self-evaluation is a permanent feature.

FACILITATE META-EVALUATION TOGETHER

- Show them that you yourself are a self evaluator and learner;
- Show how this process motivates you;
- Show how this process enriches your own understanding;
- Show them how this process provides you with feedback on your own performance;
- Make your learning outcomes explicit in meetings or on paper, or both.

Analyze the self-evaluation process as it has proceeded and discuss its strengths and weaknesses, its opportunities and threats (SWOT).

PROMOTE AN EXTERNAL FOCUS

Point out that there are many opportunities for self-evaluation and at the same time to be externally focused e.g. benchmarking, international projects as funded by Grundtvig, study visits for comparative evaluation, inviting

have the explicit objective of contacting other self-evaluators in other settings to see how they are working. critical friends, etc.

COMMENTARY

These suggestions on how the facilitators of self-evaluation and those who actually initiate it may work together have been derived from the experiences of the SEALLL project partners and project members in piloting the SEALLL approach. The most important challenge is to ensure that self-evaluation is indeed genuinely self-initiated and self-regulated, and that it meets the learning needs of those who started it. It is a challenge to both self-evaluators and facilitators to respect the autonomy of the self-evaluators. It must be emphasized that those who succeed on doing so, also appear to be the most satisfied and effective self-evaluators and learners.

2. TOOLS FOR SELF-EVALUATION

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Systemic Representation

INTRODUCTION

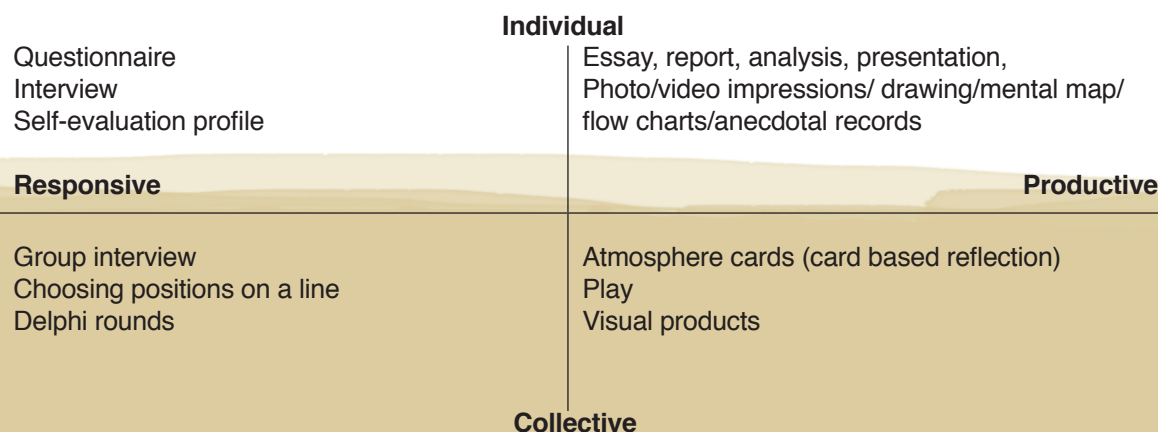
In this section there is an overview of possible methods or instruments for a self- evaluation activity. In this context instruments or tools are 'evaluation instruments' for collecting or gathering the necessary information. They are only self-evaluation instruments if they are used in a self-evaluation context. It is the context and application that turns them into self-evaluation instruments.

The instruments in this section are not meant to be applied as such. They are examples to be adapted to the particular situation or institutional needs, or they can serve as the inspiration for the creation of a new instrument.

No matter which tool one wishes to choose, the underlying thought should be a series of things one wishes to know. This implies that there will be always a list of questions behind any evaluation activity. In order to find answers to these questions, many options are available. These options include:

- Questionnaires
- Interviews
- Checklists for observation
- Checklist for document analysis
- A number of other methods

Self-evaluation activities may be either individual or collective or a mixture. They may also be responsive. This means that the respondent is involved in a way which requires responses to questions or to checklists. The respondent responds to what is asked, rather than producing information on the subject according to his/her own inner criteria. The other side of this dimension refers to a more active approach. This implies that the people involved in evaluation produce their own views, comments or explanations of what has happened and how they value it. For self-evaluation as a learning activity, it is recommended that participants search for a method which will best serve the collective learning process. The methods in this document are categorised by the four fields in the figure below.



I. INDIVIDUAL AND RESPONSIVE METHODS

Individual

<p>Interview Questionnaire Self-evaluation profile SWOT analysis Observation and recording Analysis of documents Learning questions related to personal development plans</p> <p>Responsive</p>	<p>Emoticons: color your mind Telling a story Mental map Flow-charting Presentation Letter addressed to yourself Writing an article Creating a website Reflective silence STAR Serving as a consultant in other similar projects</p> <p>Productive</p>
<p>Group interview Choosing positions on a line Delphi rounds Sparring partner / critical friend 360° feedback Thermometer with immediate feedback Four corner exercise</p>	<p>Atmosphere cards (card based reflection) Play A group painting Presentation Working with scenarios Critical incidents method Debate Prioritizing with tokens Bullseye Sculptures Body sculptures Using objects as symbols Systemic Representation</p>

Collective

INTERVIEWS AND QUESTIONNAIRES

What?

Interview: Asking questions to one or more people in a structured or unstructured way.

Questionnaire: A list of questions asking facts or opinions.

How?

In order to develop or choose a questionnaire, it is helpful to develop a kind of mental map of what you wish to evaluate. This implies that a map or diagram is drawn showing all the related factors, influences, concepts, actors, and their interrelations. From here it is possible to derive the main questions one wishes to ask. The map reveals the blanks, the doubts, the convictions, and the closed and the open questions in this field of “study”. Based on this inventory priorities can be set. The questions to be included in the instrument can be decided. Of course there is always a lot more to be known than one can possibly evaluate, so it is important to be as selective as possible in choosing the items to be included.

In formulating the questions for a questionnaire or an interview, many pitfalls are present. Pay attention to the risk of posing the following:

- Leading questions: (Do you agree that the management is the cause of all the problems?)
- Questions leading to a bias given the position of the respondents (Do you think the work load is too high in this organization?)
- Questions evoking politically correct answers (Do you invest your energy in students no matter their background, their looks, or their socio-economic status?)

Whenever you want to use questionnaires or interviews as tools have a quick test run first. This will allow you to identify the sources of misunderstandings and the pitfalls. First ask a colleague to comment. Comments gain value if they are based on actual experience, so ask your colleague to allow you to administer the tool on him/her. Then have a dry run, with someone from the target group.

The matrix below shows some considerations for choosing either closed or open questions. These can be asked either orally or in written form. This is far from exhaustive, but it gives a basis for choosing an adequate instrument.

	Open questions	Closed questions
Interview	<ul style="list-style-type: none"> ▪ To gain insight and understanding ▪ To form ideas to serve as a basis for further investigation ▪ Used for relatively small groups of people 	<ul style="list-style-type: none"> ▪ To be able to choose between, or select solutions, options, actions ▪ To reach decisive conclusions or to identify clear options for a further survey ▪ To be used for small to medium sized groups of respondents
	<ul style="list-style-type: none"> ▪ To gain insight and understanding ▪ To get a picture of the support for particular ideas or experiences ▪ To form ideas to serve as a basis for further investigation ▪ To be used among medium sized groups of people 	<ul style="list-style-type: none"> ▪ To be able to choose between, or select solutions, options, actions ▪ To get a clear picture of majorities and minorities supporting the issues raised ▪ To reach decisive conclusions ▪ To be used for large groups of respondents

EXAMPLE: QUESTIONNAIRE

1. My mentor motivates me to improve my work as a teacher/ trainee

Yes 1 2 3 4 5 No

2. My mentor provides me with, or shows me the way to new and useful information e.g. books, people, sources, materials, databases etc.

Yes 1 2 3 4 5 No

3. My mentor gives me useful feedback on my teaching

Yes 1 2 3 4 5 No

4. My mentor gives me useful feedback on my learning process as a mentee/trainee.

Yes 1 2 3 4 5 No

In the above mentioned domains of mentoring I would like to suggest the following improvements to my mentor:

On motivating I suggest:

On pointing the way I suggest:

On feedback on teaching I suggest:

On feedback on my learning process I suggest:

EXAMPLE: INTERVIEW

In this interview I would like to reflect with you on the series of mentoring sessions we had so far. I would therefore like to focus on:

- The process of mentoring
- The content of our sessions
- The learning outcomes of this process
- At the end I would like you to reflect on the kinds of learning experiences you will need in the sessions that are still to come.

I have some questions to which I would like you to react. Please feel free to express whatever comes to your mind.

Process

- Can you describe the mentoring process we went through?
- Do you feel you have had the opportunity to discuss what you think is important?
- What do you see as my role, and what as yours, in this process?
- Have the sessions met your expectations and your needs?

Content

- What have we talked about during our sessions?
- Has this been of value to your learning and teaching?
- Have we missed anything you would have liked to have included?
- If so, what would you like to put on our next agenda?

Learning

- Could you mention some of the things you learned from our sessions?
- What do you consider the most important outcome?

Perspective

- Given what you have learned so far, what do you consider to be the next step?
- What do you hope the coming sessions will offer you?
- Shall we now try to plan our agenda for our future sessions?

SELF-EVALUATION PROFILE

What?

The self-evaluation profile is a list of questions you can ask yourself about yourself. These questions can be about your learning, your competences, your vision on a certain subject, your personality, etc. Filling in the form increases personal awareness.

How?

The list of questions must be filled in by the person who wants to know more about him/herself.

Example: Tick the numbers you think are applicable.

	Yes				No
1. As a mentor I am sensitive to, and able to connect with mentees during mentoring sessions	1.	2.	3.	4.	5.
2. I am able to motivate mentees, both in the sense of giving correct information as well as in radiating their own enthusiasm	1.	2.	3.	4.	5
3. I am a good inquisitive learner demonstrating my abilities as a model	1.	2.	3.	4.	5
4. I am a skilled teacher, able to demonstrate my ability	1.	2.	3.	4.	5
5. I can listen well and empathically to my mentees	1.	2.	3.	4.	5
6. I can observe accurately the behaviour of the mentees in practical situations and during mentoring sessions	1.	2.	3.	4.	5
7. I am open minded in my evaluation and judgement of the behaviour and personal characteristics of the mentee	1.	2.	3.	4.	5
8. I am able to give adequate feedback (given the particular needs of the mentee during mentoring sessions)	1.	2.	3.	4.	5
9. I am able to find a balance between comforting and confronting (My feedback makes things move rather than get stuck)	1.	2.	3.	4.	5
10. I can be clear and concise in my messages (I reveal things rather than hide them)	1.	2.	3.	4.	5
11. I am highly committed but don't get involved too much with mentee matters and mentees	1.	2.	3.	4.	5
12. I have a professional interest in mentoring; I value my role as a mentor and act accordingly.	1.	2.	3.	4.	5
13. I am able to work strategically and systematically	1.	2.	3.	4.	5
14. I am aware of the theories they use. They are aware of the underpinning of their actions and act accordingly.	1.	2.	3.	4.	5
15. I am able to reflect upon my work and on its theoretical basis.	1.	2.	3.	4.	5
16. I am able to relate the information observed and gathered in the mentoring sessions to school development, school policy and to their professional knowledge base.	1.	2.	3.	4.	5
17. I am able to deal with many kinds of diversity e.g. gender, cultural, style, age, stage, social background.	1.	2.	3.	4.	5
18. I am evaluative and critical about my own work	1.	2.	3.	4.	5

SWOT ANALYSIS

What?

In a SWOT-analysis (Strengths, Weaknesses, Opportunities, Threats) you discuss strong and weak aspects in your mentoring practice, and also your main opportunities and threats.

The goal of opportunities is to enhance or keep the strengths and eliminate the weaknesses. Threats will decrease strengths and create weaknesses.

How?

Give a short explanation per aspect. Let everyone fill in the matrix below, individually or in a group. Discuss in what ways the opportunities and strengths can neutralize or eliminate the weaknesses and threats.

Strengths	<ul style="list-style-type: none">•••
Weaknesses	<ul style="list-style-type: none">•••
Opportunities	<ul style="list-style-type: none">•••
Threats	<ul style="list-style-type: none">•••

OBSERVATION AND RECORDING

What?

If you wish to know the level of participation of learners during classes/meetings; or the drop out rates; or the proportion of time trainers devoted to lecturing and other more interactive methods, it is possible to record data, or to observe what happens.

How?

In order to make observations a reliable way of gathering information, it is necessary to define clearly what you are looking at. There are many excellent books available on how to develop observation schemes properly. It is beyond the scope of this document to provide lists here.

Some questions you will have to keep in mind in either choosing or developing an observation scheme are:

- What do I wish to know?
- What behaviour, or facts, do I have to observe in order to know it?
- How do I define this behaviour in terms of identifiable elements e.g. visible, tangible, other?
- Do I wish to know whether things happen, or also when they happen and how often they happen?

Compared to other instruments and methods, observation is prone to be subjective unless observers make a prior effort to standardise their observation. By having pilot studies, or by having two observers independently observe the same events, you can be able to judge how suitable and reliable your instrument is likely to be.

By looking at the data and analysing it independently and then comparing the judgements, you may also see how valid the tool may be. If what you have observed appears to be related to another thing you consider as a related concept, the instrument proves to be even more valid. If, for instance, the observation of absenteeism appears to show a clear relationship with the outcomes of a questionnaire on school motivation, this supports the validity of the instrument to record absenteeism and, the other way around, the questionnaire on school motivation.

ANALYSIS OF DOCUMENTS

What?

Basically the analysis of documents is also a kind of observation. This time documents rather than behaviour are observed.

How?

Again the main point to keep in mind is to be very concise in the definition of what you are looking for in the documents. Again similar things are important:

- Identify what you wish to know
- Determine how this is shown in the document
- Decide how you are going to do the analysis - just a scan, or word by word?
- Consider whether you would like to know, not only whether things are mentioned but also how often, by whom, or in what context

LEARNING QUESTIONS RELATED TO PERSONAL DEVELOPMENT PLANS

What?

Organisations rarely have the habit of encouraging or allowing their staff to identify learning questions. If the teachers, trainers, managers and others concerned know what they want to learn, they focus much better on the relevant experiences in their work and make progress. Often the learning goals and objectives of the professionals are left vague and ambiguous. This is counterproductive for effective learning, and as a consequence for the organisation's quality and its ability to change.

It is useful to give people time to define their learning questions, and also the support to do something with them!

How?

The definition of learning questions can be done individually. However, it is recommended that they should be shared with a colleague. It is also important to identify what should be done to reach the learning goals.

Example

What I want to learn is:

Learning goal:

How will I know I have reached the goal?

What do I want to do?

What support do I need?

What is my time schedule?

II. INDIVIDUAL AND PRODUCTIVE METHODS

Individual

Interview
 Questionnaire
 Self-evaluation profile
 SWOT analysis
 Observation and recording
 Analysis of documents
 Learning questions related to personal development plans

Emoticons: color your mind
 Telling a story
 Mental map
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 Letter addressed to yourself
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 Four corner exercise

Atmosphere cards (card based reflection)
 Play
 Visual products
 Working with scenarios
 Critical incidents method
 Debate
 Prioritizing with tokens
 Bullseye
 Body sculptures
 Using objects as symbols
 Systemic Representation

Collective

EMOTICONS – COLOUR YOUR MIND

What?

This tool helps you to reflect on several aspects of mentoring.

How?

Mark or colour your emotion with symbols or felt-tipped pens

😊 if you're feeling happy about it, 😐 if you experience neutral feelings (or if you just don't know), ☹️ if you're not happy. For any other emotion, fill the empty emoticon ○ .

You can ask people to complete this and you then analyze the reactions.

Example

What feelings do you experience during mentoring regarding...

MENTOR	😊	😐	☹️	○
MENTEES	😊	😐	☹️	○
TOPICS	😊	😐	☹️	○
ACTIVITIES	😊	😐	☹️	○
DISCUSSION	😊	😐	☹️	○
FEEDBACK	😊	😐	☹️	○

TELLING A STORY

What?

This method is a creative way of telling a story. This process helps you to tell your story (again to yourself) or to others. Leading questions can be:

How did you become a trainer?

What was your learning process?




What kind of development do you recognize?

Any difficulties?

How?

Make a 'comic' of the way you learned to be a mentor, from the beginning to the present.

Example

Day 1	I don't understand anything...	Don't worry... we've got five days to teach you how to be a mentor!	Day 5
			

MIND MAP

What?

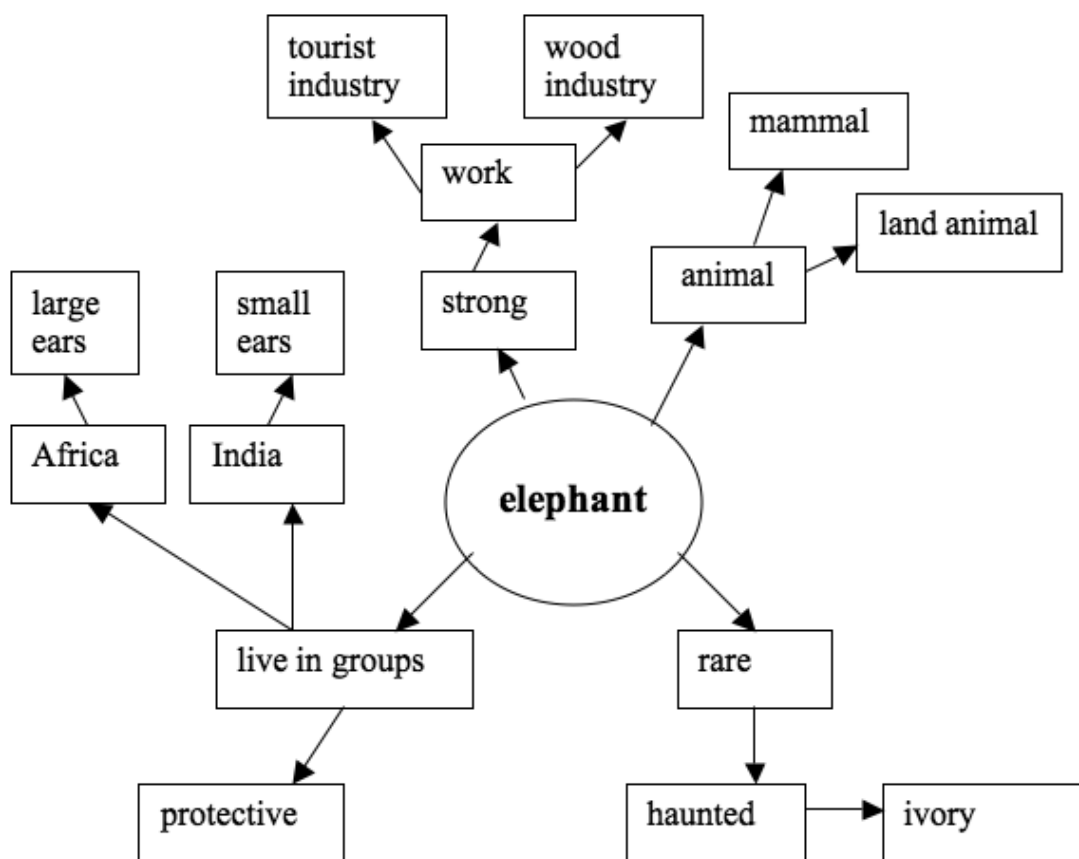
A mind map contains everything you can think of about the topic you've chosen.

How?

Choose a topic. Start brainstorming and write down every association you have. Along the way, or afterwards, you can categorize the associations. You can do this individually or in a group.

Example

A mind map looks like this:



FLOW-CHARTING

What?

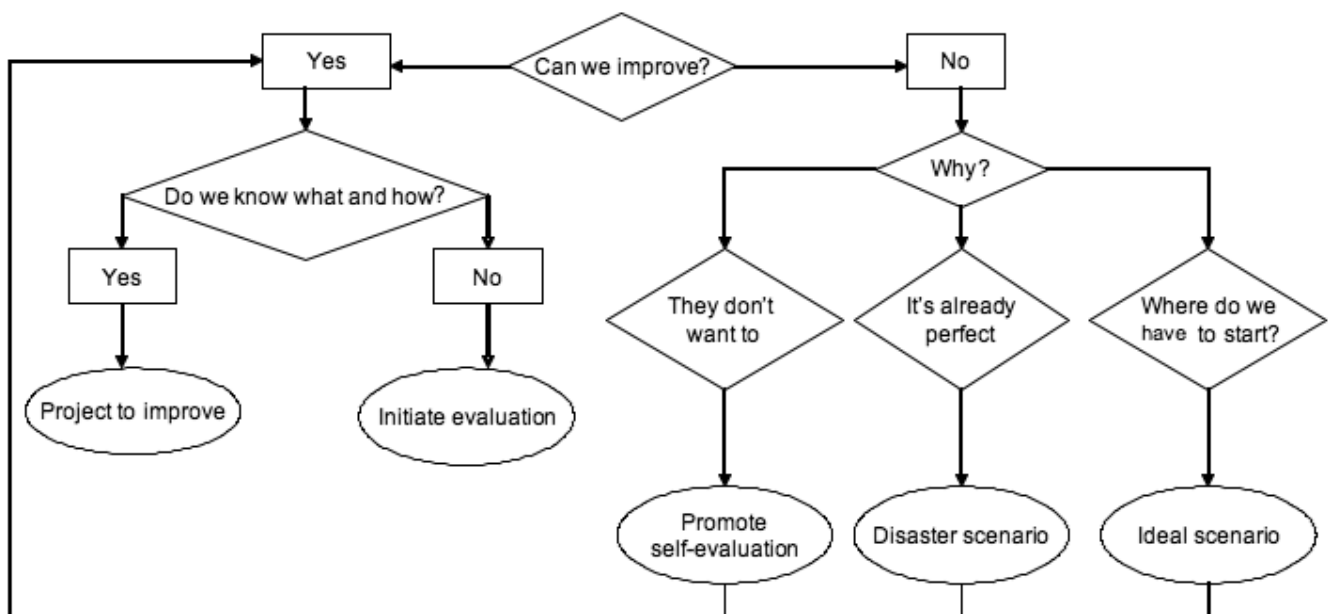
This instrument is used to get an overview of items which should be included in an evaluation, or to define the steps to be taken in a process.

How?

There are two ways of flow-charting:

The reflective flow-chart:

A reflective flow-chart can be helpful when there is a problem linked to personal resistance. This flow-chart is a schematic overview of questions which have to be answered in relation to the defined problem. This way we can get a number of project instruments (in case the problem is clearly defined) or a number of evaluative instruments (scenarios).



The disaster scenario is helpful when people think that everything is perfect. It makes people reflect about what can happen if things go wrong.

What if.... nobody is interested in our programme, the programme has no relation to the practical situation of the learners, nobody can understand our philosophy,?....

What has to be done to keep us from disaster?

The ideal scenario is used when people recognise the problem, but don't know where to start. They reflect on what could be ideal.

It would be great if.... there is a direct relation between our programme and the practical needs of the students, the students are encouraging their colleagues to attend our open programme,...

What must be done (or what do we need to know) to achieve this ideal situation?

The worst situation is when people are not willing to improve. In this case there is a lot of work to do. This means that the whole discussion about the value of self-evaluation has to take place in order to define its benefits and to create a positive environment for self-evaluation. All obstacles must be removed to turn self-evaluation into a learning process.

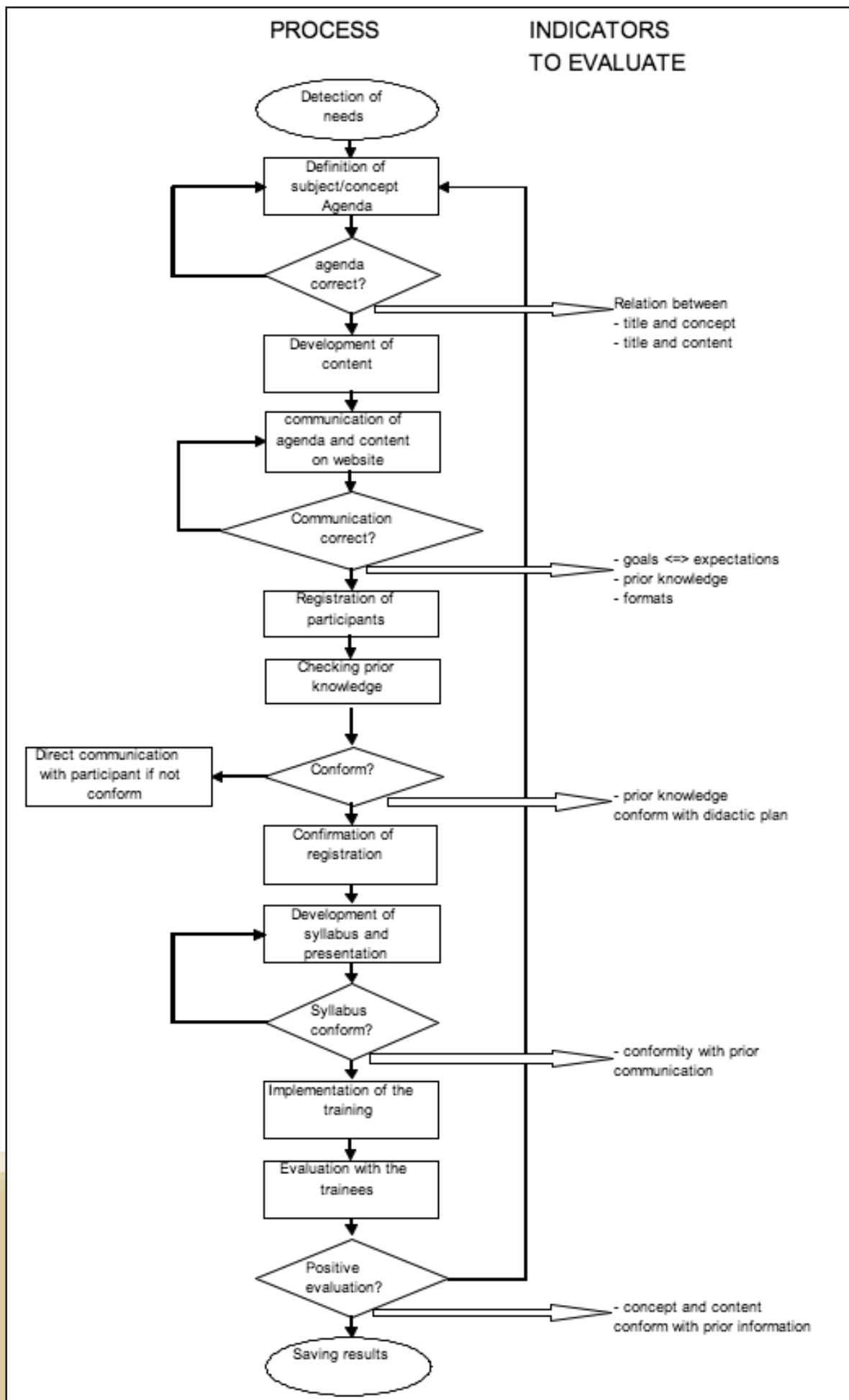
1. The constructive flow chart:

This is used when the evaluation needs several steps. An example is communication about an educational programme on more than one topic and at several moments in time. The participants in the evaluation are asked to write down the different steps in the process on *post-its*. Then, in a plenary discussion, the steps are put in the right order. As soon as all agree, indicators and responsibilities can be added to the chart.

Example:

The different steps of how a training programme is executed were put onto a flow-chart. In light of the external communication about the training, the indicators are linked to every step. Norms are discussed for each indicator and then compared with the outcomes. e.g. the expectations of the learners are different to what we had mentioned in the programme. Consequently the text on the website has to be adapted to the content.

We also want the learners to have a basic knowledge before they come to the training for advanced learners. How can we communicate this requirement in a positive way?



PRESENTATION

What?

Tell others about what you have learned, want to learn, have observed, etc. The advantage of a presentation compared to an article is the discussion it triggers. The dialogue that follows is one of the richest ways of learning from experience.

How?

Be sure you have an interested audience. Tell your story and encourage feedback.

LETTER ADDRESSED TO YOURSELF

What?

People write a letter to themselves about what they have learned or want to learn. This improves both learning and the impact of the evaluation.

How?

Ask people to write a letter to themselves including statements of what they have learned or what they intend to go and do with what they have learned. The letters are collected by the trainer. These letters are then sent to the writer a few days later.

WRITING AN ARTICLE

What?

Nothing is more evaluative than to have to present an experience on paper. This requires analysis, comparisons, reflections, formulation, and articulation.

How?

You write an article to be published in a newsletter or journal. You can ask all members of a group to do so and create a reflection book together.

CREATING A WEB SITE ABOUT THE PROJECT/PROGRAMME

What?

The involvement of new technologies adds to the quality of this instrument. Furthermore it serves a similar purpose to writing articles or making a newsletter: writing down experiences to share them with others is very supportive of the learning effect.

How?

Create a website and write items.

REFLECTIVE SILENCE STARR

What?

Description of: Situation, Time, Actions, Results, Reflection (STARR)

It sometimes is very useful to build in silences in the rush-rush, hectic race of daily professional life. Use these moments to reflect and write down what you wish to remember from the experiences you went through. Consider alternative actions and reflect on them.

How?

Give everyone a piece of paper. Ask for absolute silence. Use this method at the end of a course for example.

SERVING AS A CONSULTANT IN OTHER SIMILAR PROJECTS

What?

Helping others actively in evaluation is often a very good way to analyse your own situation. Because others will want your advice, you will have to be very explicit about what you think may work out, and what you think won't. Questions will be asked about your evidence and the background to your advice. Thus you will have to make up your own mind systematically.

How?

Be sure you know what the other team expects from you. What is to be evaluated? Also be transparent about your learning motives.

III. COLLECTIVE AND RESPONSIVE METHODS

Individual	
Responsive	Productive
<ul style="list-style-type: none"> Interview Questionnaire Self-evaluation profile SWOT analysis Observation and recording Analysis of documents Learning questions related to personal development plans 	<ul style="list-style-type: none"> Emoticons: color your mind Telling a story Mental map Flow-charting Presentation Letter addressed to yourself Writing an article Creating a website Reflective silence STAR Serving as a consultant in other similar projects
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Collective	

GROUP INTERVIEW

What?

A group interview involves asking questions to a group of people to acquire information. Choose this method if you want people to inspire each other and to share information. It also saves time compared to individual interviews.

How?

To lead the discussion well, you must be sure about what you want to find out. Introduce the purpose of the interview. Ask your questions, open or closed. Ensure that people stick to these questions.

Example

Dear fellow mentees,

In this group interview we would like to share with you your experiences with, and evaluation of the work of the mentor during this mentoring period.

In this group interview we would like you to share your experiences in working with the mentor, and also make evaluation of the work of the mentor during this mentoring period. To do this, we have prepared a questionnaire.

We suggest the following procedure:

- We will meet, but then complete our questionnaires individually;
- We will discuss our answers and our motivation behind the answers;
- We will have the opportunity of adding to our answers, but not changing our original answers, only adding;
- We share the changes in our opinions, if any;
- If applicable we will identify common recommendations to pass to our mentor.

The questionnaire (same as the individual tool)

1. My mentor motivates me to improve my work as a teacher/ trainee

Yes 1 2 3 4 5 No

2. My mentor provides me with, or shows me the way to new and useful information e.g. books, people, sources, materials, databases etc.

Yes 1 2 3 4 5 No

3. My mentor gives me useful feedback on my teaching

Yes 1 2 3 4 5 No

4. My mentor gives me useful feedback on my learning process as a mentee / trainee.

Yes 1 2 3 4 5 No

In the above mentioned domains of mentoring I would like to suggest the following improvements to my mentor:

On motivating I suggest:

On pointing the way I suggest:

On feedback on teaching I suggest:

On feedback on my learning process I suggest:

CHOOSING POSITIONS ON A LINE.

What?

To show where people stand both figuratively and literally and their opinions and perspectives, you can ask them to choose a position on an imaginary line on the floor in the room. Thus you force them to take a position. In this way you make visible what differences exist in the group.

How?

Make sure that it is clear what each pole of the imaginary line means: yes/no, 0 %/ 100%, etc. Ask a question or make a statement. Invite people to choose a position on the line. Ask around: why did you choose this position?

Example

To reach the objective of this mentoring process you have to travel through a long learning process. If we compare the length of that travelling process with the length of this room starting from this wall to that wall, how far have each of you come so far?

Please show your answer by choosing your position on the line between the walls. We invite you to go and stand at the position where you feel most comfortable.

Some of you will then be asked to explain why you have chosen the position in which you are standing.

The procedure will be completed by sharing a few thoughts on how we evaluate the situation as indicated by the positions chosen e.g. have we come far or not very far? where might we speed up or do better? what are we proud of ?

DELPHI ROUNDS

What?

A Delphi round is a method to explore the opinions of people. People give their opinion individually. There are several rounds. In each round the given opinions are shared on paper, so that this can influence the way people think and their opinions in subsequent rounds.

How?

Take a look at the example.

Example

Goal

To develop a common view on what good mentoring is

Question

What do you think are important features of good mentoring?

Process

Everybody is invited to add one feature to a list that will then be written on a flip-chart;

When your turn comes round again, you may also add a tick to one of the points already mentioned by others, but not yourself;

We will make at least two rounds of the group;

Then, in the final round, everybody is asked to tick the three features they think are the most important.

In this way we get an overview of the:

- important features of good mentoring;
- support of the respondents for the particular points mentioned;
- relative importance of the points as indicated by the respondents.

SPARRING PARTNER / CRITICAL FRIEND

What?

Having someone to talk to, to have debates with, to share doubts with, to share your professional kicks with, enriches the learning process enormously.

How?

Look for a person who asks you the kind of questions which help you learn. You can talk. You can also invite someone to a meeting to observe and afterwards evaluate together.

360° FEEDBACK

What?

This is a deliberate confrontation between the observations or views of a professional and the observations or views of superiors, colleagues, subordinate staff or students. The focus is on the difference perspective to which the different positions might lead, in order to understand better the dynamics of the world in which the participants operate.

How?

Decide on the items on which you want feedback. Develop a form, perhaps like the example below. Fill in the form yourself. Ask at least three people around you to give feedback. Compare the results, and then identify your strengths and weaknesses.

Example

Mark five qualities that are very well developed and five that need development.

This is to be filled in by yourself, your manager, a teacher colleague and a student.

To be developed	Qualities of me as a mentor	Developed well
	<ol style="list-style-type: none"> 1. As a mentor I am sensitive to, and able to connect with mentees during mentoring sessions 2. I am able to motivate mentees, both in the sense of giving correct information as well as in radiating their own enthusiasm 3. I am a good inquisitive learner demonstrating my abilities as a model 4. I am a skilled teacher, able to demonstrate my ability 5. I can listen well and empathically to my mentees 6. I can observe accurately the behaviour of the mentees in practical situations and during mentoring sessions 7. I am open minded in my evaluation and judgement of the behaviour and personal characteristics of the mentee 8. I am able to give adequate feedback (given the particular needs of the mentee during mentoring sessions) 9. I am able to find a balance between comforting and confronting (My feedback makes things move rather than get stuck) 10. I can be clear and concise in my messages (I reveal things rather than hide them) 11. I am highly committed but don't get involved too much with mentee matters and mentees 12. I have a professional interest in mentoring; I value my role as a mentor and act accordingly. 13. I am able to work strategically and systematically 14. I am aware of the theories they use. They are aware of the underpinning of their actions and act accordingly. 15. I am able to reflect upon my work and on its theoretical basis. 16. I am able to relate the information observed and gathered in the mentoring sessions to school development, school policy and to their professional knowledge base. 17. I am able to deal with many kinds of diversity e.g. gender, cultural, style, age, stage, social background. 18. I am evaluative and critical about my own work 	

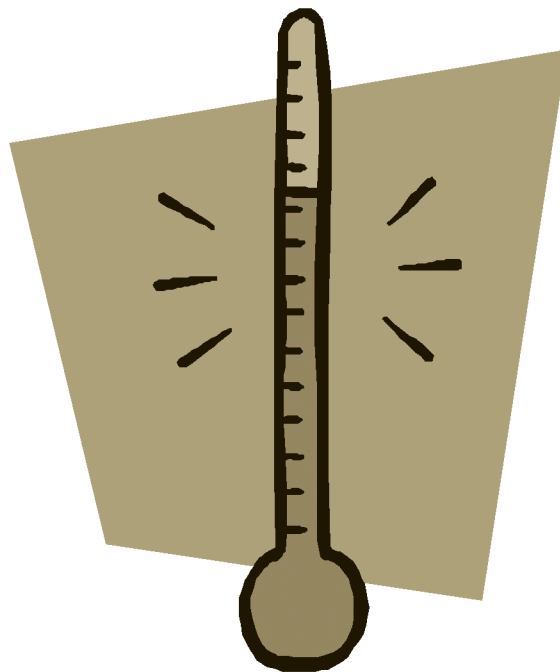
THERMOMETER

What?

People can give an opinion by placing a mark on a drawing of a thermometer. This provides immediate feedback. Possible questions : how do you value this workshop? What level of development have you reached in these two days?

How?

Draw a thermometer on a flipchart to indicate how participants value the event in which they participate. The flip chart is turned away from the people and one by one they pass along the flipchart to mark their position on the line of the “thermometer”. You can choose whether you want to identify the dimension on which they score or leave that open. Afterwards you turn around the flipchart and the distribution of positions on the line drawn is visible to everybody and may be discussed and clarified.



FOUR CORNERS

What?

This allows you to make the different opinions of individuals on a given topic more easily visible to a larger group of people. It can be done with large and smaller groups, using a whole room or, alternatively, paper or a board with stickers or markers. Groups of at least ten make it more interesting.

How?

You pose a question e.g. how far have we met your expectations? and then formulate a ++ / + / - /-- position, one for each corner of the room. Then allocate a corner of the room to each position, and ask the participants to position themselves in relation to the indicators. Finally, take the role of a roving reporter to ask individuals why they have chosen the particular position.

Alternatively, you can put the question and positions on a large graph on a whiteboard or flip-chart. Then ask people to make their positions (i.e. opinions) visible with a sticker or marker-pen. Then you ask them for comments or reasons explaining their choice.

Example

How far have we met your expectations?

++: very much so; + : satisfying; - okay, but some dissatisfaction; -- : not at all

++	+	-	--

IV. COLLECTIVE AND PRODUCTIVE METHODS

Individual	
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Collective

CARDS BASED REFLECTION

What?

People are invited to reflect on a process through a picture, an image. This enlarges their creativity.

How?

From a selection of cards people are invited to choose one card which in a way matches their impressions of the process.

Participants are invited to explain in plenary why this particular card was chosen.

After everybody has explained their impressions, the dialogue turns to the final question:

What does this tell us about the process so far and does it give any clues as to how to proceed with it in future?

A PLAY

What?

Reconstructing an experience or a process in order to discover the important elements.

Example

BEFORE & AFTER

Perform a play in groups of about five people. How did you feel/ think about your teaching before we started the mentoring sessions and how are you feeling/ thinking about your teaching now? Show the differences!

Try to be specific and imaginative. You may think of a plot, the setting, the characters involved, the text, but also body language, props, etc.

To help you organize and develop the play, fill in this table together:

BEFORE	AFTER
<ul style="list-style-type: none">•••	<ul style="list-style-type: none">•••

A GROUP PAINTING

What?

Making a painting in sub-groups in order to define characteristics of a process.

How?

People are asked to form groups of three or four. Their assignment is to create a painting together which shows the main characteristics of the process and its context; and also the roles of the trainer and participants within it.

It is important that the painters in each group do work on one painting on which they agree.

After the paintings are completed a dialogue must be encouraged between the subgroups of painting participants about the meaning and the implications of the paintings. It is important to point out that this is really an attempt to reveal central issues and not just fun! Nevertheless the process will be fun and probably even more so if you succeed in making it meaningful. It is not the artistic quality that matters, but the message and the meaning.

WORKING WITH SCENARIOS

What?

One aspect of learning is having the ability to do things better in future. Developing future scenarios immediately turns present experiences into options for the future. This facilitates the transfer of what is learned to future actions, and / or decisions about the future. It is desirable to develop two or three alternative scenarios rather than one, This enables participants to promote the dialogue needed to provide the rich learning context which makes self-evaluation a learning experience.

How?

Invite people to think in a 'what if...?' mode. Write down, or draw things. Make sure the scenarios are consistent.

CRITICAL INCIDENTS METHOD

What?

This method enables you to reflect on important situations that have occurred or will occur. What is done? What should be done? What do we have to know and be able to make this work? etc.

How?

Reconstruct events from your own experience and identify critical moments when you had to make decisions. Ask others to think about what they would have done in the same situation. Say what you did, and compare your decision with the choices others would have made. Identify what this implies for future action.

PRIORITIZING WITH TOKENS

What?

Allocating money as a token of the priorities given to different parts of the project. Dividing money clearly shows the values given to various aspects of schooling. It is a way to make the value given to things more visible. People tend to be willing to fight really hard about money. The fight over money makes it clear where people put their priorities. The debate about why and about the evidence is what this exercise is all about. This is what provides the learning and the clarification of the positions of the participants.

How?

Point out the items for which money can be given. Tell people how much money they have. Ask them to decide how much money will be given for each item. Afterward, discuss the results.

BULLSEYE

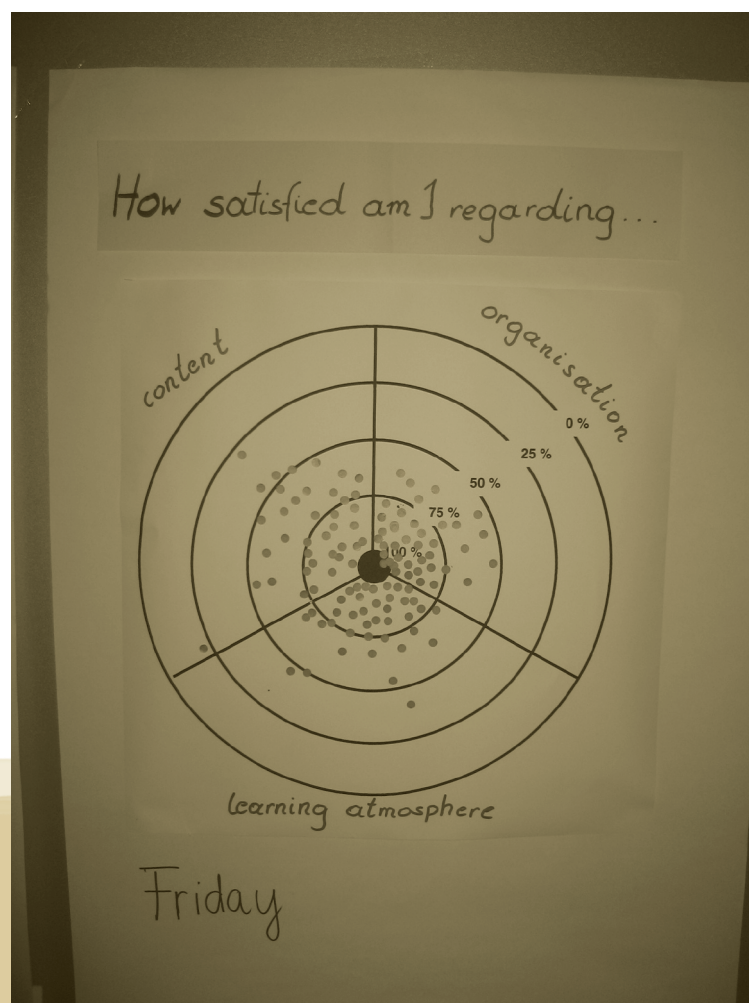
What?

You can use this method when you want to know the opinion of a group on, for instance, a meeting or a conference. All participants are asked to give an opinion about the content, the programme, the organization and the climate. Up to four questions are possible on one bullseye, but it is possible to use only one or two or three. The opinion is given with a sticker placed on a bullseye, as illustrated below. Remarks can be written down on a piece of paper hanging besides the bullseye. The results of the evaluation are visible immediately. A group discussion can follow.

How?

Create a bullseye and allocate it at a central place in the room. Put an empty piece of paper beside it. Make sure that every participant has as many stickers as you have questions. Give a brief explanation of the items to be scored. Invite people to put the stickers on the bullseye and also to write down any remarks. Afterwards, analyze the bullseye together and draw conclusions.

Example



BODY SCULPTURES

What?

You can use this method to express group ideas with actions rather than words. People can be asked to work in groups of up to eight people e.g. to form a sculpture with their bodies expressing the quality of their teamwork, or the training event.

How?

It is good to have two or more groups. Allow some ten to fifteen minutes for preparation for each group. When one group shows their “work of art” the other group forms a circle round it or walks round the sculpture and is invited to make comments on what they see. The “sculpture” freezes. This means that people are not supposed to move or talk, but just listen. When there are no more comments the “sculpture” melts. Its members are allowed to react to the comments, or explain what they wanted to express and what has not been seen by the observers. Very often these comments prove to be enriching, as they provide an outside perspective.

USING OBJECTS AS SYMBOLS

What?

Choosing and touching an object expressing your feelings at the end of a training day or similar event helps people to connect with the right hemisphere of the brain. The method creates an intensive atmosphere and the curiosity to listen to others. It helps relieve conflict situations, while people still enabling people to express their satisfaction or dissatisfaction.

How?

Provide a variety of small objects (e.g. office material, paper clips, a pair of scissors, markers, a CD, sunglasses, lipstick, a feather, flowers, ...). Make sure you have more objects than people present. Ask everybody to choose an object which in their opinion is best expressing the question asked. Then ask them to sit in a circle, show their object and express in a one or a few sentences why they have chosen this symbol. This can be done with up to 40 people. With more, concentration and attention seem to fail. You, or a rapporteur, need to take notes about the symbols and the reasons for choosing them.

SYSTEMIC REPRESENTATION

What?

According to systems theory one person can represent a whole system. So at the end of a session or course, you choose concrete positions representing either inside perspectives e.g. working atmosphere, content, methods, or some outside perspectives e.g. the education system, a superior, somebody affected by our work, the EU-commission or abstract phenomena e.g. quality, community, progress, God and ask a person to represent this view.

How?

Ask people to represent “their” topic. Give them a few minutes to reflect. Then make them sit or stand so that everybody can see them and allow them a few minutes to describe, everything from their perspective. Finally, ask all other people for reactions e.g. any surprises or confirmation, and then simply to add what went through their own minds while this was happening.

sealll

SELF EVALUATION IN ADULT LIFE LONG LEARNING



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