EVALUATIVE INQUIRY: THE ROAD TO A LEARNING ORGANIZATION

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DEDICATION

This paper is dedicated to my family in its large version. To my parents from the old fashioned Spanish countryside, who witnessed in amazement how their daughter, in her late forties, embarked on an academic program in another country, depriving them of her most needed presence and dedication, to learn about things they could not even understand; to the grown-ups of my close family, my husband Antonio and my friend Cristina, who were constantly there for me throughout the long, five year process of studying and working; to the young ones, Antonio and Irina who had to deal with a student-working mother at a time when they needed me so much.

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ABSTRACT

This study looks at the effects of evaluative inquiry as a tool for organizational development in the “Centro de Lenguas y Educación Intercultural” (CELEI), a small educational institution. The study is framed as an action research and its purpose is to initiate a process of organizational change that will consolidate the newly established institution and to introduce learning as a built-in organizational strategy.

The study is structured as a meta-research on the evaluative inquiry intervention. The intervention was a cooperative effort carried out by an in-house evaluation team and the participation of all staff members. As Action Research, the evaluation process and outcomes become the main source of research data. A staff questionnaire was passed to assess personnel satisfaction and perception of the institution before the start of the evaluation. At the end of the process, a group interview was used to assess change as a consequence of the intervention.

Reflection on the data, shows that evaluative inquiry contributed in vary relevant ways to organizational development in CELEI. Particularly in fostering a common vision and mission for the institution, promoting teamwork and stimulating learning. The action research had a very positive effect on researches learning that will be capitalized in her role as manager of the institution.
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INTRODUCTION

This study is an action research project based on an evaluative inquiry intervention in the Centro de Lenguas y Educación Intercultural (CELEI) in Granada, Spain. The project’s aim is to foster organizational development in the institution and to set the base to start a change process toward developing a learning organization.

In any action research project, two action research cycles operate in parallel. One is the cycle of evaluative inquiry intervention and the other is a reflection cycle on the action research. Consequently, the study has adapted methodology and format to accommodate the complexity and nature of data implied in double loop research.

Background

This capstone project is a logical consequence of my practicum effort aimed at establishing CELEI. CELEI was legally established in January 2005 as an educational organization specializing in the design and implementation of customized intercultural programs for international university and high school students, and the delivery of training workshops. CELEI inherited a portfolio of ongoing college study-abroad programs and high school summer-abroad programs for U.S. participants as well as a number of teacher-training initiatives for the Department of Education of Andalusia, Spain.
CELEI also benefited from the extensive professional experience of its core founding team in the fields of experiential learning and intercultural education. CELEI staff was loosely bound to the different programs as they worked only intermittently since they were required to fulfill different program tasks on a temporary basis. Consequently, the team lacked cohesion and had not internalized either an institutional vision or organizational model that would allow CELEI to perform as a consolidated institution.

The need for a more formal organization became apparent for two reasons: First, the nature of the study-abroad programs was changing and, second, there was an increasing lack of sustainability that reflected the changes in the market for study-abroad programs.

For over 20 years, study-abroad programs in Spain had been designed according to the sending institution’s needs and requirements, which essentially called for a homemade structure that offered personalized attention to the students, with close and informal access of the participants to academic resources and extensive immersion in the community. While the nature and quality of the programs offered was considered satisfactory by the sending institution, the School for the International Training (SIT) was pressing to have a formal organization to support the study-abroad programs’ delivery in Spain in order to be academically competitive in today’s market.
The existing structure was essentially a “one person show” that was not only difficult to manage but also represented a professionally unacceptable workload. These circumstances also prevented any kind of program diversification or growth, thus jeopardizing long-term sustainability.

The practicum was characterized by activities that helped establish CELEI legally, upgraded its facilities and physical plant, and elaborated basic internal regulations. These activities gave rise to a formal institution with great potential for expansion and growth—and with the formal capacity to develop programs in intercultural education and training in the region of Granada for Spanish and international participants.

Yet the staff was still invested in the former structure, where the personnel lacked a true feeling of belonging and the staff responded to the sending institutions’ demands on an ad hoc basis—without internal standards and clearly stated goals for CELEI. This became one of the challenges of the fledgling CELEI; new personnel expectations were created during the practicum process. In addition, at the institutional level the need arose for formal organizational development, team-building efforts, professional staff training, and marketing. All these became important for consolidating the institution and guiding it into the future as a reference center in Granada for program development and implementation of intercultural education and training.
The capstone research resulted from the need to consolidate a team of professionals within CELEI who would be committed to: strengthening both the organization’s programs and its internal structure; developing learning-based strategies for improved teamwork and a participatory leadership that would allow CELEI to build a shared mission, develop internal regulations and strategies; and strengthening the staff’s professional capabilities and skills. All these steps were imperative in order to overcome the situation that had been inherited from previous conditions.

Institutional Context

At the beginning of this research project, after it had been formally established, CELEI delivered two Study Abroad programs per semester for SIT, with an average number of 25 students, three Summer Abroad programs each summer for the U.S. Experiment in International Living (EIL), with an average of 100 participants, and several teacher training workshops for the teaching center of Andalusia’s Department of Education.

The core staff of CELEI was composed of nine professionals full time or significantly involved in the programs delivered by CELEI, all of whom were considered “key” to the development and future growth of the institution. These nine professionals were:
• One full-time secretary and member of CELEI, whose responsibilities included administration and accounting tasks, assisting with the logistic of programs and the coordination of homestays.

• Two Academic Directors hired directly by SIT and responsible for the Study Abroad programs. One of them also a member of CELEI.

• Three Language teachers responsible for the Language component of the Study Abroad and Summer Abroad programs. They worked on CELEI’s payroll on a temporary basis and were hired for three periods each year for a total of seven and half months.

• One university art professor, also responsible for coordinating the theme component of the study abroad programs. This person also served as liaison with many university professors and other professionals who collaborate on the programs. She works on a contractual basis.

• One Assistant Director, member of CELEI, who took responsibility for human resources, summer programs and language coordination, as well as overseeing facilities and maintenance.

• One Director, the Researcher, member of CELEI, whose responsibilities included institutional representation of the organization, general management of the organization, overall institutional development, project development and training.
CELEI also counts with a large number of collaborators whose contributions are essential to the development of the programs. These collaborators include university lecturers, independent study project advisers, homestay community coordinators, summer teachers and monitors. The contribution of these professionals, though small due to their short-term involvement, is very significant and essential to the implementation of specific components of the programs.

Conceptual framework

As I strove to learn about organizational development and institutional strengthening, I began to do more reading on program evaluation. As I will discuss below in the Literature Review section, in the course of completing my practicum and beginning preliminary research for my capstone, I learned more about program evaluation, which I increasingly saw as absolutely essential for further development and improvement of both CELEI as an institution and a program provider.

The field of program evaluation developed parallel to the profession of management consulting and organizational development. These professions often focus on change in organizations, including (but not limited to) solving communication problems, conflict resolution, leadership development, teamwork, diversity training, shaping organizational culture, and organizational learning. The evaluation field contribution is important because it puts emphasis on reality testing through the
systematic collection and rigorous analysis of data for judging merit, guiding improvement or simply generating knowledge. As the use of evaluation has become increasingly common in today’s society, the evaluation alternatives have diversified to accommodate different needs, uses and purposes.

One of the first things I read was Michael Patton’s *Utilization Focused Evaluation*, which presents a wide menu of evaluation alternatives with the focus on intended use by intended users. Among them, the following definition of developmental evaluation is included: “Developmental evaluation refers to evaluation processes undertaken for the purpose of supporting, project, staff and/or organizational development, including asking evaluative questions and applying evaluation logic for developmental purposes. The evaluator is part of a team whose members collaborate to conceptualize, design, and test new approaches in a long-term, ongoing process of continuous improvement, adaptation and intentional change” (Patton, 1997:105)

It was this particular approach that captured my interest for utilizing evaluation as a developmental tool in the effort of making CELEI a learning organization capable of consolidating the range of programs already offered, creating new lines of work for the future and facilitating professional learning strategies of its members.

In fact, choosing evaluation to catalyze the organizational development process is an approach that, I believe, embodies the principle of Experiential Learning as a meaningful tool for professional growth and institutional development. Putting the
emphasis on applying and evaluation (the last steps of the Experiential Learning Cycle) allowed us to conceptualize and shape our vision of the institution and use evaluation logic during the whole process from establishing the purpose, goals and objectives of the evaluation: deciding what issues were worthy of being evaluated, selecting indicators to be considered, setting standards acceptable to the team, and defining the appropriate use of findings in order to improve teamwork, programs, and the organization itself.

The research also used the concept of empowerment evaluation, defined as “the use of evaluation concepts and techniques to foster improvement and self-determination” (Fetterman, 1996: 1). This concept of evaluation was most appropriate when the goals of the process included helping participants to become self-sufficient and personally efficient (Patton, 1997), an important skill to develop in CELEI if it is to succeed in finding its market niche and perform at high standards when designing and delivering programs, in the field of intercultural education and training of the Spanish education system and the international sphere.

Keeping all this in mind, the research project was focused on an Evaluative Inquiry intervention in CELEI envisioned as an ongoing process for investigating and understanding critical organizational issues. Evaluative inquiry as an approach to learning integrated in the organization’s work practices was expected to generate (a) the interest and ability of the organization’s members in exploring critical issues using
evaluation logic, (b) the involvement of the organization’s members in the evaluation processes, and (c) the personal and professional growth of individuals within the organization. (Preskill and Torres, 1999)

The initial evaluative inquiry intervention, which the research was based on, focused on a new direction beginning for the organization, as a guiding theme, which examined the organization’s current status: its strengths and weaknesses, available alternatives and changes that would be most worthwhile to undertake. This process helped CELEI staff to gain a shared understanding of the organization and to collectively construct a common vision and mission for its future development. It also allowed the evaluation team to gain evaluative inquiry skills and experience the benefits of professional and organizational learning.

Based on this initial conceptual background, this evaluative process allowed me to address the following research question:

**In what ways did Evaluative Inquiry contribute to Organizational Development in CELEI, a small educational institution?**

Some of the sub-questions considered include the following:

i. What were the main challenges that an internal evaluator faced applying Evaluative Inquiry to organizational learning purposes?

ii. What significant adaptations were needed to implement Evaluative Inquiry within the Spanish context?
iii. What were the costs/benefits of including Evaluative Inquiry as an integral part of the CELEI operational model?

iv. How could this evaluation project be applied to other institutions/programs in the Spanish Education system?
LITERATURE REVIEW

The preliminary research and review of the literature supporting this action research project focused on two main areas: (a) learning organizations and organizational learning, and (b) program evaluation as a learning tool for organizations. Since my approach was that of an action researcher, a comprehensive view of all theories and trends in these two fields of inquiry was not intended. Rather than an extensive review of all the literature, I have instead conducted an in-depth study of specific subjects and issues essential to gaining a sound understanding of organizations and evaluative methods, which enabled me to undertake action research within my own organization.

In my attempt to try to understand my organization (CELEI) and in order to gain a comprehensive overview, I have drawn from the book *Reframing Organizations: Artistry, Choice and Leadership* by Bolman and Deal. Their approach encompasses major schools of organizational thought and offers four distinct perspectives (or approaches) labeled as frames: the structural, human resources, symbolic and political frame. According to them, these frames are not only considered “windows” to the world, but also “lenses” which help “bring the world into focus” (Bolman and Deal, 1997: 12). In
the hands of managers, these four distinct frames can also become powerful tools for organizational change.

Four Frames

The structural view of organizations provides a perspective which focuses on understanding the pattern of roles and relationships – the organizational architecture -- that will accomplish collective goals while accommodating individual differences. Organizations achieve collective goals through specialized roles, functions and units along with vertical and horizontal methods of integration. They rely on authority, rules and policies to coordinate the work. For a manager who is contemplating organizational changes and development, “understanding the complexities of organizational contexts and the variety of structural possibilities can help create structures that work for, rather than against people and the purposes of organizations.” (Bolman & Deal: p.58)

The human resource frame stresses the relationship between people and organizations. This perspective regards people’s skills, attitudes, energy and commitment as vital resources capable of making (or breaking) an enterprise. It is built on the following core assumptions: organizations exist to serve human needs rather than vice versa; people and organizations need each other; incompatibility of an individual and a system harms one (or both); and compatibility benefits both. Even in the new context of global economy, the increasing competition among firms and the
drive to reduce operating costs, the human resource frame advocates treating the work force as an *investment* rather than a *cost.* (Waterman, 1994)

The **political frame** sees organizations as arenas where different groups compete for power and scarce resources. Jeffrey Pfeffer’s (1978) explicitly political conception of this is: “Since organizations are coalitions, and the different participants have varying interests and preferences, the critical question becomes not how organizations should be designed to maximize effectiveness, but rather, whose interests and preferences are to be served by the organization” (p.223). As a tool, the political frame helps managers recognize and understand political realities as well as develop agendas, create networks of support and negotiate effectively with both allies and adversaries. It should be remembered, as pointed out by J. F Moore (1993), that organizations are not only arenas for internal politics, but also political agents in larger arenas or ecosystems. Sometimes they may take on a life of their own, pursuing their own organizational interests and seeking a viable niche.

Finally, there is the **symbolic frame.** According to this perspective, symbols embody and express an organizational culture – the interwoven pattern of beliefs, practices, and artifacts that define who its members are and how they should do things. This frame stresses the importance of organizational symbols, stories, myths, rituals and ceremonies in the process of developing meaning, identity and cohesion along with a sense of belonging in an organization. Studies show that managers who understand
symbolic forms and activities and encourage their use help shape effective organizations (Bolman and Deal, 1997: 231).

Since the evaluative inquiry intervention aims at reframing the institution, understanding my organization using each of the four frames was essential to my research topic. It was particularly significant for me as a leader and manager in order to better understand CELEI in all its complexity and with all its subtleties. It provided me with several distinct ways of reflecting on the organizational knowledge and leadership skills that were required in order to carry out the subsequent evaluation process.

Applying the frames as presented by Bolman and Deal certainly helped me develop an understanding of my organization. Nonetheless, as stated in the opening of the Literature Review section above, sets of concepts which helped me create a conceptual framework for my research were derived from two areas of inquiry.

**Learning Organizations**

First, I surveyed the literature for ideas on learning organizations and organizational learning. This was an especially important area of research since one of the goals of the action research was to establish a foundation for becoming a learning organization.

The concept of learning organization was primarily developed by Peter Senge. In his book *The Fifth Discipline: the art and practice of the learning organization* (1990), he presents learning organizations as “organizations where people continually expand
their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together.” (1990: 3) The basic rational for advocating such organizations is that in an environment characterized by uncertainty and rapid change, such as the environment most organizations face today in the 21st century, people and organizations alike depend on their ability to learn in order to survive. To achieve this, organizations need to “discover how to tap people’s commitment and capacity to learn at all levels” (1990: 4)

Senge identifies five dimensions which distinguish learning from traditional organizations. He presents the dimensions as disciplines - defined as a set of principles and practices we study, master and integrate into our professional and personal lives. These five dimensions are:

*Personal mastery* – understood as the discipline of “continually clarifying and deepening our personal vision, of focusing our energies, [of] developing patience and seeing reality objectively.” (Senge, 1990: 7) In this context, mastery is seen as proficiency and it is a core dimension of organizations to learn — through individuals who learn.

*Mental Models* – “deeply ingrained assumptions, generalizations or even pictures and images that influence how we understand the world and how we take action.” (Senge, 1990: 8) These mental models are the key to the way people understand both organizations and the role they play in them.
**Shared vision** – understood as “the capacity to hold a shared picture of the future we seek to create.” (Senge, 1990: 9) This vision is essential in uplifting commitment and encouraging experimentation and innovation.

**Team learning** – considered to be “the process of aligning and developing the capacities of a team to create the results its members truly desire.” (Senge, 1990: 236). This is an essential dimension for a learning organization and it is dependent on the people’s capacity to learn and act together in order to achieve the desired results for an organization.

**Systems thinking** – understood as the ability to comprehend and address the whole, and examine the interrelationships between the parts. Senge considers “systemic thinking” – the fifth discipline – to be the real cornerstone of his entire approach. “It is the discipline that integrates the other disciplines, fusing them into a coherent body of theory and practice.” (Senge, 1990: 12)

Today, most conceptualizations of a learning organization are generally based on the assumption that “learning is valuable, continuous and most effective when shared, and experience is an opportunity to learn.” (Kerka, 1995) More specifically, the following characteristics appear in some form in the most popular conceptions of learning organizations (Smith, 2001): provide continuous learning opportunities; use learning to reach goals; link individual performance with organizational performance; foster inquiry and dialogue, making it safe for people to share and take risks; embrace
creative tension as a source of energy and renewal; maintain continual awareness of
and interaction with the environment.

One of the conclusions to be drawn from the previous academic work on learning
organizations is that fundamentally a learning organization calls for a new view on
leadership. The view of the new leaders or the view to be implemented by existing
leaders—should be characterized among others by a continuous expansion of capabilities,
a growing understanding about the organization’s complexity, and better clarification of
the organization’s vision.

To some people, the concept of the learning organization is clear enough to be put
into practice easily and quickly, while to others, it remains a vague and amorphous
mental construct which needs critical attention. Naturally, the truth lies somewhere in
between, whereby insights can still be drawn from both theory and practice. Thus, a
learning organization perhaps is best thought of as a journey, an ongoing quest, rather
than a destination; a philosophy, rather than a program. (Solomon, 1994)

Program Evaluation

The second area of my research as I prepared a conceptual framework for this
study focused on program evaluation. As a field of professional practice, this area is
relatively new. In the U.S., it emerged within social programs of the 1960s and 1970s
parallel to large-scale government intervention in response to the need for greater
accountability. International interest in evaluation has also grown, as governments and
institutions faces similar accountability challenges. Parallel to the growing interest for evaluation was the emerging awareness of the need to develop evaluation standards. Initially, evaluation had simply followed the criteria of social research, namely, ensuring technical quality and methodological rigor. However, with the growth and expansion in the field of evaluation, standards became a necessity. The first comprehensive effort to develop such standards was carried out by the Joint Committee on Standards in 1981. This committee essentially stipulated that evaluations had to have four fixed features: utility, feasibility, propriety, and accuracy.

Linked to these main fixed features were a number of important concepts which helped distinguish the different approaches to evaluation and the different evaluation philosophies:

**Use of findings:** There are three main approaches to the use of evaluation findings: summative evaluation, improvement-oriented evaluation and knowledge-generating evaluation. *Summative evaluation* (or result-oriented evaluation) is an evaluation aimed at judging the worth or merit of a program. It is performed after completion of a program or after stabilization of an ongoing program. Summative evaluations are usually for the benefit of an external audience and will result in decision-making on the funding and maintenance of the program. *Improvement-oriented evaluation* (or process evaluation) focuses on finding strengths and weaknesses in a program and progressing towards desired outcomes. This type of evaluation is useful to
managers and program staff and implies an instrumental use of findings in guiding personnel in the implementation process. Finally, knowledge-generating evaluation is aimed at conceptual use of findings – that is clarifying program models, distinguishing intervention types, generating lessons learned, or testing theories. This particular use of evaluation is of interest to policy-makers and program designers as well as scholars and researchers.

**Evaluation Use:** This concept is related to the intended use of findings and relates to the utilization of evaluation findings, a problem that has concerned evaluators for many years. Often, evaluation findings are largely unused by organizations throughout the years and evaluation efforts lost as a result. Eleanor Chelimsky (1983) introduced the concept of “intended use for intended users.” She argued that the most important kind of accountability in evaluation comes from “designed track and follow-up of a predetermined use to predetermined users” (Chelimsky, 1983:160).

In time, the idea of utilization-focused evaluation emerged as a comprehensive approach to evaluation (Patton, 1979). This approach placed value on the most important aspect of evaluation, where the user (or stakeholder) is the single most relevant factor influencing evaluation use. Thus, the task of the evaluator in this approach is to identify the primary stakeholders and to cooperate with them in determining their information needs. Beside the results-oriented use, evaluation process and logic embraces other factors such as “(1) enhancing shared understanding,
especially of results, (2) supporting and reinforcing the program through intervention oriented evaluation, (3) increasing participants’ engagement, sense of ownership[ and self-determination (participatory and empowerment evaluation), and (4) program or organizational development” (Patton, 1997: 91).

Evaluator Role: This concept is of crucial importance to the validity and credibility of evaluations. The initial summative, judgment-rendering evaluations called for the need of external expert evaluators that would produce technically-sound evaluations which were also independent from political or organizational pressures. Over time, however, the emergence of process evaluation implied a shift from external to internal evaluators who could offer continuity to the evaluation effort also serving as catalysts in the implementation phase of evaluation findings and recommendations.

It is true that an internal evaluator has the great advantage of knowing the organizational culture and having a first-hand insight into the issues being evaluated, but at the same time, there is always the potential danger of the internal evaluator being a vested interest of a particular power group. Thus, questions of independence and integrity arise among different evaluation schools and associations with regards to the concept of the role of the evaluator.

There are, however, two distinct tendencies within the American Evaluation Association: academic evaluators, who emphasize the research purposes of evaluations, offer or uphold traditional standards of methodological rigor, provide summative
outcome studies and produce contributions to social science theory; service evaluators, who emphasize the needs of stakeholders, generate program improvement, offer qualitative methods and help facilitate decision-making. Steering a fine line between these two approaches is the concept of situational evaluations introduced by Patton (1997). This concept, like situational ethics (Fletsher, 1966) or situational leadership (Blanchard, 1986; Hersey, 1985) “is grounded in the situation in which it occurs” (Anderson et al, 1996: 6).

The standards and principles for evaluators established by the American Evaluation Association in 1995 provide an overall direction, a foundation of ethical guidance, and a commitment to professional competence and integrity. But there are no specific rules an evaluator can follow. From a situational perspective, the “right way” is one that will be meaningful and useful to the evaluator and the intended users. But finding this way requires constant interaction, careful negotiation, and rigorous situational analysis.

**Evaluative Inquiry**

An approach that emerges from the advances made in the field of program evaluation and combines the above-mentioned considerations in a systematic fashion is evaluative inquiry. This approach was introduced by Preskill and Torres essentially to enhance learning in organizations (Preskill and Torres, 1999).
Evaluative inquiry approaches evaluation as a learning experience by using dialogue and reflection in order to identify learning opportunities, create a learning environment and develop inquiry skills. Through this approach, the evaluating team's role is that of an informed facilitator who simply provides the structure for a learning process. “Learning from evaluative inquiry is a social construction occurring through the involvement of multiple constituencies, each representing different perspectives. It is socially situated and mediated through participants’ previous knowledge and experiences” (Preskill and Torres, 1999: xix).

The precise methodology for evaluative inquiry delineates four learning processes: (1) dialogue, (2) reflection, (3) asking questions, and (4) identifying and clarifying values, beliefs, assumptions, and knowledge. Some of the more important features of this approach include: shared individual, team and organizational learning; education and training of practitioners in inquiry skills; modeling the behaviors of collaboration, cooperation and participation; establishing links between learning and performance; searching for ways to create greater understanding of the variables that affect success and failure; using a diversity of perspectives to develop understanding of organizational issues.

Evaluative inquiry thus emphasizes learning as an outcome of the process, in addition to the more summative, product-oriented outcomes normally expected of an evaluation study. The evaluator seeks to teach participants and stakeholders evaluation
skills and processes so that subsequently they may continue to engage in evaluation practice. In this way, evaluative inquiry contributes to individual, team, and organizational learning and integrates practices that will make evaluation sustainable and on-going. In addition, evaluative inquiry relies on fundamentally democratic processes such as asking questions and exploring individual beliefs, assumptions, and knowledge through an on-going dialogue process. It is an approach committed to the belief that varying viewpoints enrich both the process and the outcomes of the inquiry. Clearly, such methodology significantly contributes to a culture of inquiry that values continuous improvement and learning as well as participation. This seemed most appropriate for the purposes and needs of CELEI.
RESEARCH METHODOLOGY & METHODS OF INQUIRY

Conceptual Framework

The topic and nature of the research questions (centered on evaluative inquiry) lead to qualitative research. As S. Merriman states, “qualitative research is an umbrella concept covering several forms of inquiry that help[s] us understand and explain the meaning of social phenomena with as little disruption of the natural setting as possible.” (Merriman, 1998: 5)

Within the approach of qualitative research, this project took the form of action research focusing on knowledge in action through the implementation of an evaluative inquiry of CELEI as a way of developing the organization. Using this approach, I was following the view of Shani and Pasmore who state: “Action research may be defined as an emergent inquiry process in which behavioral science knowledge is integrated into existing organizational knowledge and applied to solve real organizational problems. It is simultaneously concerned with bringing about change in organizations, developing self-help competencies in organizational members and adding to scientific knowledge. Finally, it is an evolving process that is undertaken in a spirit of collaboration and co-inquiry.” (Shani and Pasmore, 1985: 439)
I was also following the ideas of Coghlan and Brannick: “Action research focuses on knowledge in action. Accordingly, the knowledge created through action research is particular, situational, and developed out of praxis. In action research data are contextually embedded and interpreted. In action research, the basis of validation is the conscious and deliberate enactment of the action research cycle.” (Coghlan and Brannick, 2005) The research project in the context of CELEI called for an action research format to insert it into the institutional change process.

I also considered the research through the lens of a case study in order to frame the process of evaluative inquiry intervention in CELEI. As Creswell states, “a case study is an exploration of a ‘bounded system’ or a case (or multiple cases) over time through detailed, in-depth data collection involving multiple sources of information rich in context. This bounded system is bounded by time and place, and is the case being studied, a program, an event, an activity, or individuals.”(Creswell 1998: 61)

The case study frame allowed for different sources of qualitative and quantitative information such as interviews, observations, documents, as well as questionnaires or tests that complemented each other in offering a detailed picture of the institution as it stood and the changes that occurred following the intervention. This lens was particularly useful in determining the boundaries of the study within the spiral of cycles involved in implementing change in the organization.
The participants in the research were all the members of the CELEI staff involved in the fall term programs, 9 members in total. They were invited to participate in the cooperative evaluation on a voluntary basis. Their participation rate served as an indicator of the degree of involvement generated by the intervention. Data collection was primarily the researcher’s responsibility with the help of the evaluation team members who kept track of observations during the intervention period.

Methods of Inquiry

There are two research projects running concurrently in this paper – what Zuber-Sherrit and Perry (2002) call the “core action research” – the CELEI evaluative inquiry intervention and the capstone research on this intervention. Each of these required different methods of inquiry. In the following section, I will present the respective methods of inquiry and the implementation timeline of both. I will then give an account of the evaluative inquiry intervention followed by a general layout of the capstone research structured in three distinct phases.

**Evaluative-inquiry Intervention:** This phase was carried out by an evaluation team composed of four members. The team consisted of an academic director, a university professor, a language teacher, and the director of the institution (and researcher). The team’s composition was decided by the researcher based on the need to include representatives from the different departments of the institution. The researcher
also considered the need of having a good mix of skills and personalities working together. All members of the team agreed to participate on the evaluation project aimed at team-building and the design of a cooperative self-evaluation for CELEI.

**Team formation** was guided by the work of Deborah Harrington-Macking who has written on team-building. (Harrison-Macking, 1994) The team embarked on an experiential cycle of learning by doing, which implied that they had to conform as a functional working team and to elaborate an evaluation design for CELEI.

The evaluation design was based on the approach presented by Preskill and Torres in their work on *Evaluative Inquiry for Learning in Organizations* (1999). This meant that the process was framed as a learning experience on the path to a learning organization. The focus of the intervention was a “new direction beginning” for the institution as a whole. In addition, an application phase was elaborated from the design stage as a necessary step in the change process of CELEI.

Design components of the evaluation were drawn from *Enhancing Organizational Performance: A Toolbox for Self-Assessment* (Lusthaus, Adrien, Andersen, and Carden, 1999). Stake-holders were identified, four evaluation areas agreed on, and indicators and instruments developed for each area (see Appendix B: Evaluation Areas Framework). The instruments used included a collaborative workshop and a data collection effort through observation and analysis of documents (see Appendix C: Evaluation Design).
The collaborative workshop consisted of a reflective exercise about CELEI and its staff positions. This aimed at building together a common vision and mission about CELEI as well as helping team members become aware of the current situation of the institution. In addition, agreements were reached on immediate actions that would be undertaken in order to achieve short term objectives.

The workshop was structured into five activities: (1) learning about teamwork basics and conforming as a team to carry out the evaluative exercise, (2) group dialogue to surface knowledge, awareness and attitudes about CELEI, (3) assessing strengths and weaknesses of the institution, (4) envisioning a shared vision for CELEI in the future, (5) brain-storming on appropriate actions to achieve common goals.

Data collection was structured around four areas: equipment, human resources, operational scheme and sustainability scheme. Guidelines were designed for each of the areas contemplating specific criteria of data generation: sub-areas, indicators for each of them, and instruments to generate information.

Data processing was carried out using a guideline developed from prior research done on the work of Preskill and Torres (see Appendix D: Data Processing Guidelines). Material was organized to inform the indicators in each evaluation area, subsequently several layers of analysis were applied leading to an evaluation report. Final recommendations were elaborated by the evaluation team following guideline criteria
and taking into account recommendations presented by evaluation participants throughout the intervention.

The evaluation report was sent to CELEI staff for their consideration and an evaluation session was held to present and discuss the report. This feedback session included a group interview component framed as a dialogue to assess the perceived effects of the evaluation at the individual, team, and organizational levels.

**Capstone research:** The second method of inquiry related to direct capstone research was structured into three phases:

**First Phase – Setting the Baseline**

The research process started with a period of data collection to establish a baseline (or benchmark) in order to document the current CELEI situation. The aspects considered included work environment, staff satisfaction, involvement, and commitment to the institution, as well as CELEI institutional development (in terms of internal protocols, regulations, procedures, and accountability systems).

To collect baseline information, a questionnaire was passed to all participants. This questionnaire (see Appendix E: Staff Questionnaire) was adapted from *Enhancing Organizational Performance: A Toolbox for Self-Assessment* (Lusthaus, Adrien, Andersen, and Carden, 1999) and designed as a tool to gather data from staff on their level of satisfaction with the organization and their perception of its level of performance.

**Second Phase – Evaluative Inquiry Intervention**
The research itself was designed as a meta-analysis of evaluative intervention in order to look at how it contributed to the organization’s development. Within this frame of action research, the process and content of the entire evaluative-inquiry became the material for reflection, in order to answer research questions.

The instruments used to gather information during this phase were the “process observer” and “recorder reports” (see Appendix F: Report Protocols) and a variety of other materials generated in the process of team formation, protocols and projects development, organizational data surfacing, and implementation of procedures.

**Third Phase – Assessing Change**

The research process came to a conclusion with another round of data collection from CELEI staff to assess changes in the organization’s institutional and team development. The instrument used was a semi-structured group interview conducted with all participants in order to explore their perception of change in the institution as a consequence of the evaluation intervention, as well as their position towards the institution after the intervention (see Appendix G: Interview Document).

**Research timeline**

- **September 5th–20th, 2006**: Distribution, implementation, and collection of base-line questionnaires.
- **September 25th –November 20th, 2006**: Eight working sessions of the evaluation team to work on team formation and evaluation design.

• December 2006 – March, 2007: Data collection period.

• April 2007: Evaluation team worked on data processing and elaborated the evaluation report.

• May 5th, 2007: Evaluation report sent to CELEI staff.

• May 18th, 2007: Evaluation report presentation and “assessing change” group interview

Concurrently with the evaluation, several teams were launched within the organization to work on project-based team building, as a new way of carrying out CELEI programs and fulfilling organizational responsibilities.

Presentation & analysis of data

In action research, data collection rapidly becomes information generation in a spiral of data production, reflection, action-taking, and the resulting outcomes that subsequently become information. Thus, the materials developed in the evaluation are the very basis of data used in the research. These materials relate to team formation and evaluation design, as well as the evaluation report and specific project outcomes. The presentation of this data must necessarily include descriptive accounts of the context and process, as well as the researcher’s reflections presented in a separate box. These offer a comprehensive view of the outcomes of evaluation intervention and the data generated during the entire process.
Subsequent data analysis takes the form of organizational diagnosis which examines the institution’s current state and points to ways of enhancing organizational effectiveness. The diagnosis is usually done using organizational frameworks as diagnostic tools. These help organize the produced data into useful categories in order to identify the relationships between organizational dynamics such as purpose, strategy, structure, control and information systems, and culture. By identifying the relationships between and among these elements, the researcher gained insights about the institution and its development, and reached conclusions that would answer the research questions of the study.

Research Opportunities & Limitations

The whole process was an immense challenge for me. This was the first experience I had as a researcher and the first time I had been involved in conducting research on my organization, while serving as its manager, but the experience as a whole was a source of rich information and served as a valuable reflective scenario, far beyond I had anticipated.

The image that best captures the process is one that considers the full experiential learning cycle reproduced in multiple action research cycles in the context of CELEI. Using the experiential cycle format allowed me to make use of every component of the intervention as a valuable source of data generation – not only to answer the research questions but, most importantly, to take note of the wealth of
existing materials and to recognize existing organizational shortcomings. Reflection on both the process and the outcomes of the different project teams also generated relevant data on teamwork potentials and risks.

But the most significant difficulties I encountered had mostly to do with assuming leadership responsibilities both as an internal evaluator and manager, leading collaborative learning as well as managing resistance to the change process initiated with the evaluation. Serving in this dual capacity – playing the role of both manager and evaluator – was a challenge I had not expected to turn out so difficult, so challenging or so rewarding, in the end.
STORY & OUTCOMES

The data generated through the activities described in the preceding section will be presented in the form of a story, a factual narrative of the research as it unfolded. This will include significant self-reflection in order to present the view of the researcher in addition to and separately from the information generated by the cooperative and group work.

Setting the Baseline

The research began at the beginning of the fall semester 2006, with personal contact with CELEI staff members to explain the purpose and the procedures of the institutional self-evaluation and the researcher’s “action research” project. Three CELEI team members were also contacted in order to explain and start the evaluation process.

To obtain baseline information on CELEI, a staff questionnaire (See Appendix E: Staff questionnaire) was designed and circulated. The questionnaire assessed the perception of the institution and the level of satisfaction of its staff members. All questions were presented as positive statements, so that the level of agreement would reveal positive perception and satisfaction on the part of the respondent.
The data obtained from this questionnaire revealed that CELEI was perceived by a great majority (74.8%) of its staff as being “only in an acceptable position.” This was reflected in the three evaluation answers: “I disagree”, “I partly agree”, and “I agree.” There was a significant minority (11.2%) who checked the option “I do not know.” Still a reduced minority (2.6%) checked the option “I strongly disagree”

Additional comments to the questionnaire brought up the following issues: three respondents expressed difficulties in answering the questions, for lack of information or due to their special position within the organization; three respondents elaborated on training needs; two respondents showed positive reaction to the self-evaluation – “evaluating the organization is interesting and necessary” (respondent 1); two respondents mentioned communication problems and the need of implementing protocols; while one respondent elaborated on the uncertainties facing CELEI, another pointed out that it was well managed given the circumstances.

Based on the information generated, the researcher’s observations on the organizational performance of the institution and its staff environment reflected several things: (1) performance achieved by CELEI acceptable at the developmental stage, but not yet at a functional level and not yet consolidated; (2) a staff environment which showed increased expectations of CELEI, demanding attitudes and difficulties in
accepting responsibilities. These were two of several areas on which activities needed to focus.

**Researcher reflections:**

My understanding of the institution and its current context, prior to the start of the research, led me to the following assumptions: a) collaborative evaluation would increase people’s involvement, b) experiential approach would facilitate people’s learning and increase their engagement in the projects, c) the precarious work situation of employees and the good perspective to generate viable projects would serve as incentive to work together on institutional development, d) my long working experience and academic background would ensure quality.

**Evaluation Intervention**

In addition to ongoing institutional development efforts, the below evaluation intervention significantly increased staff responsibilities. Tasks, which were not directly attached to original job descriptions or related to programs’ implementation needed to be completed. Overall, the work environment was significantly affected especially since the evaluative inquiry required a significant time commitment. However, despite these temporary drawbacks, the evaluative inquiry intervention generated very valuable
institutional material in terms of documentation and actual project outcomes, as well as significant information on process.

At the first stage, an evaluation team project-based experiential training was launched to work on team-building and cooperative internal evaluation design. The training was framed to allow team forming and performing, in an intense process of learning and doing.

The team met for eight sessions of four hours, each section divided into two parts: the first concentrated on learning about teamwork and elaborating documents necessary to function as a working team. The second one focused on learning about collaborative institutional self-evaluation, focusing the evaluation and elaborating the evaluation design.

Documentation produced during this stage included team-building materials (see Appendix H Teambuilding Document) that were used for the trainings and as a tool for performing in working teams during the entire process, and evaluation materials which allowed the team to perform the evaluation of CELEI (see Appendix C Evaluation design).

Implementation of the evaluation began with a two-day collaborative evaluation retreat facilitated by the evaluation team. This exercise allowed CELEI staff, for the first time, to share their views and assumptions about the organization, analyze its strengths and weaknesses and explore measures that could be undertaken to advance the
organization in the desired direction. The exercise also increased confidence of the evaluation team and generated very positive energy among all participants. The collaborative work also gave way to a serious personal confrontation that challenged the facilitating team skills and untapped underlying group dynamic issues in need of attention.

After the evaluative exercise, the evaluation team continued working on team-building and gathering evaluative data, while CELEI management worked on organizational development implementing some recommended measures and structuring working teams. This stage finalized with an in-progress report, presented at the closing of the semester, which updated CELEI staff on the progress of the evaluation, shared the information generated by the data collection effort, and presented a management proposal on project-based working teams.

This stage generated very valuable documentation about CELEI in five areas: facilities, technological equipment, teaching materials, organization and academic documents, and library inventory. It also had important outcomes in terms of design and implementation of protocols and launching of team based projects.

The last stage of the intervention started in mid-January and concentrated on two distinctive areas: evaluation and project design. The evaluation team worked on data processing, assessment and elaboration of the evaluation report and recommendations (see Appendix H: Data Processing Guidelines).
This was a particularly enriching learning experience for the evaluation teams, which resulted in an evaluation document offering a rich description of the institution, a well documented assessment, and a complete set of recommendations (see Appendix I: Evaluation Report). Project-based teams were launched at the time as a management decision of compensating teaching hours lost after the cancellation of a study abroad program and maintaining teachers’ salaries, in return for dedication to team building and projects’ design (see Appendix J: Project-Based Working Teams). The involvement in and performance of these teams was unbalanced and teams yielded irregular results in terms of both teambuilding and project outcomes.

The team working on a summer program for Spanish participants, consisting of two teachers, the secretary, the summer programs coordinator and the director, met five times along with several working sessions during January through March to prepare the project. Team members struggled to perform as a team and to fulfill individual responsibilities. Most of the members felt that attention to teamwork interfered with effectiveness in project design.

On the other hand, while all members were willing to contribute in the designing phase, teachers resisted collaborating in program dissemination and publicity. The final outcome was a well-designed project, which neither materialized itself in form of good advertisement, nor in form of appropriate dissemination, thus getting canceled for lack of applications (see Appendix K: Summer Program for Spanish Participants Project).
The team working on university study abroad programs was formed on a voluntary and non-remunerated basis and included an academic director, a university professor, a language teacher and the director. The purpose of the team was to develop several study abroad programs that would strengthen the institution in the study abroad field and consolidate the Spanish department. It met for three sessions during January and February and worked on the design of two projects: “Spain: Gateway to Human Migration” and “Arts as a Lens in Social Science”.

As a whole, the team performed quite effectively in programs’ elaboration, although, one of the team members had a lot of difficulties complying with team rules, questioned non-remunerated participation, and showed very limited contribution. The many ongoing responsibilities of the team members and tasks undertaken by CELEI slowed down the activity of this team after the first phase of research and discussion on programs’ format, content and quality criteria and the elaboration of the first draft for one of the programs (see Appendix L: Study Abroad Immigration Program Design).

Responding to the request of the Director of Academic Affairs of Laurel de la Reina Secondary School, a team was formed to work on an evaluative intervention in a public secondary school. Initially the team was composed of a CELEI teacher, four school members and the researcher, but shortly after the team was created, the CELEI teacher abandoned the team. The intervention consisted of four team work sessions to prepare and carry out the evaluation of one of the school projects called “Attention to
Diversity and Inclusion of Down Syndrome Students in the Classroom” and four sessions working with a large majority of the school faculty devoted to performing collaborative evaluation of the project. The intervention concluded successfully with an evaluation report, which was positively valued by the faculty and endorsed by the school management (see Appendix M: Laurel de la Reina Project).

Teamwork format was also applied by the language department to their meeting sessions, communication channels, and team role responsibilities. This team included two academic directors, three language teachers and the coordinator. The team was quite dysfunctional throughout the semester; members’ compliance was very low whereas frustration and conflict proved to be very high. This difficult atmosphere was aggravated during the semester closing session by an open confrontation and an offensive behavior of one of the teachers towards an academic director. The event created great turmoil in the whole team requiring mediation by the director.

The presentation of the evaluation report took place on May 18th, shortly after the storming of the language team. The session included an initial ceremony of recognition and apology. The evaluation report presentation was planned as a group discussion to allow participants to offer their input on the report. Participants’ received the report in advance and time was allowed to revise documentation generated by the evaluation. The existing sensitive atmosphere in the group affected participation in the discussion. Contributions addressed clarifications, questioning some of the recommendations with
respect to time line implementation. Some teachers also questioned the evaluation
recommendation with respect to increasing the staff members’ language and culture
competency in English and the advantages of working in multifunctional teams.

**Researcher Reflections**

The evaluation process revealed strong individual and group dynamics that
challenged most of my initial assumptions and revealed sharp intercultural differences
in the way each member understood the process. In addition, the meaning that it had
for each member of the organization (including myself) and the personal reactions and
behaviors which it prompted were particularly strong. The initial favorable reactions of
all CELEI members were explained by their understanding that they were collaborating
with me on an academic project. They were quite unaware of the intervention as a
whole being an institutional change process. As the intervention progressed and
specific actions and procedures started to be implemented, I discovered that people
were not internalizing what they learned, translating it into a modification of
professional attitudes and behaviors. Rather, they were following formalities without
assuming ownership and responsibility for the collaborative effort of personal and
institutional development.

My response to the situation was twofold. On the one hand, I deepened my
study and reflection in order to understand underlining personal, professional and
cultural assumptions in each of the CELEI members, their behavioral manifestations
and effects on performance and group dynamics, also elaborating related bibliographical materials and sharing my own insights with others in the context of teambuilding training and informal coaching sessions. On the other hand, I clarified institutional criteria and strengthened management directions to increase compliance and task efficiency.

Reactions to this approach could be organized into two different groups. First, there were language teachers who reacted by conforming as differentiated interest group of employees detaching themselves from the vision of CELEI as a team embarked on a collaborative effort of institutional change. They were critical of the professional performance of CELEI on every level of management and academic direction. They were also defensive about their professional merits and rights. In addition, there was growing dissatisfaction with the new trend of the organization, which required multifunctional team performance and individual professional development. The rest of CELEI members had a positive reaction which manifested itself in an increased awareness, compliance, and collaborative attitude. Members also manifested resentment towards language teachers and discomfort in their personal and professional relations with them, which resulted in a very negative team dynamic. In addition, some of the discord was founded on unbalanced distribution of power among CELEI members.
In addition, there were unexpected and unforeseen external challenges, which affected the organization and the carrying out of its activities. During the time of the evaluation, CELEI underwent a difficult period. One of the two study abroad programs the institution delivered for SIT was canceled in the spring of 2007 and a major redesigning effort to restructure SIT study abroad in Spain was made by the sending institution. The aim was to offer a new modular program titled “Spain: Language, Community and Social Change”. This new program is scheduled to start in the spring of 2008 and will accommodate different levels of language abilities and offer several themed seminar options within a single coherent program. However, in consequence of this, CELEI lost a significant amount of workload as well as income, which jeopardized the financial viability of the institution and the job stability of the staff. The situation generated strong feelings of uncertainty and anxiety among staff members and forced CELEI to undertake a serious project development effort to diversify its field of operation as an educational service provider for national and international institutions, and to expand its partnerships.

Assessing Change

The evaluation report session included a group interview to assess the perceived effects of the evaluation on the institution and on the team. The exercise was framed as
a group dialogue. Participants were invited to answer the following three questions (listed along with their responses):

What meaning has the evaluation had for you?

The most common answer referred to the introduction of team work. This was a concept that was not exactly common or well-understood before the intervention. Other answers referred to gaining relevant information about the institution, obtaining a global idea of the institution and its complexity, seeing the institution take shape during the process, gaining information and confidence about CELEI as an education provider of SIT, participating in the transformation of one of the members into a leader.

What have been the main effects of the evaluation on the institution?

A majority of the participants expressed that the most significant effect of the evaluation was the critical self-reflection which surfaced strengths, weaknesses and opportunities, and pointed out the direction of change. Other answers referred to performing in teams, information generation, focusing the institution on development, actual structural and organizational implementations, increased awareness of the process, conceptualization of the institution, facilitation in clarifying institutional relations between SIT and CELEI, and the development of teamwork material.

What have been the main effects of the evaluation on you?
Many participants expressed that the evaluation had facilitated self-reflection on professional competency and involvement and enabled individual learning and performing in teams. Other answers referred to the emergence of conflicts over dual roles, gaining professional skills in assessment, decision-making, and problem-solving, gaining appreciation for the work of the evaluation team, allowing to express feelings and take positions as a member of the SIT staff inserted within the CELEI team, gaining self-confidence, facing issues of group conflicts of interest, gaining perspective on change processes and insecurity (see Appendix N: Group Interview Transcript).

**Personal Reflections**

The elaboration of the evaluation report offered me the opportunity to integrate the whole picture of the institution and assess my personal and professional investment in the evaluation inquiry intervention as a tool for the development of CELEI. It also allowed me the opportunity to reflect on the multiple roles I played during the process—a director, manager, and employer, on the one hand, and an evaluator, researcher, and trainer on the other.

As a manager and researcher, I was fully involved in successive and concurrent cycles of experiential learning in which application lead to new experiences. More specifically:
As a manager I have gained a comprehensive view of CELEI, internalized many institutional procedures and gained skills on situational analysis, decision-making and strategies to seek compliance. I gained a better understanding of my role as a manager and leader, the way role responsibilities translate into actions and a particular position within the institution.

As a researcher in a cooperative action research, I learned how important it is to start at the actual group level and proceed in the format and pace the group can follow. I realized that a great cultural gap exists between my American-style approach and their Spanish cultural standpoint.

All this personal learning translated into professional decisions and actions. In the managing sphere, there was a major focus shift in CELEI, from being an institution which tried to develop around the needs of the existing team, to CELEI as an institution with a clear vision and mission, which the staff would agree with or participate in to the extent were willing to do so.

In the evaluative learning process, I made an incredible effort to develop learning instruments, share my understandings and assumptions, facilitate many reflection opportunities, and actively seek input and feedback, as well as exercise modeling, guidance, and compliance control. The evaluation report included a section with the researcher’s remarks to share my insights on the evaluation process. A key excerpt is included below:
“In the double role as the responsible of CELEI and an expert, I consider that the process of evaluation has shaped the institution as an entity independent from the people forming it. Evaluation presents [the organization as] weak in its staffing and internal structure and also as an institution, which learns through project-based teamwork. A learning organization requires personnel which are determined to learn and an infrastructure which facilitates and consolidates learning. This is an important lesson that each of us needs to assimilate as personal learning. The double role of director and expert during the evaluation process will be transformed into the role of director and trainer in the implementation phase, to develop an organizational structure including learning as an integral part of CELEI operations.” (See Appendix I: Evaluation Report)
REFLECTION ON THE STORY IN THE LIGHT OF EXPERIENCE & THEORY

This section will offer reflections on the experience of the organization’s activities in the course of action research, in order to answer the following research question: ”How does evaluative inquiry contribute to organizational development of CELEI? In the pursuit of this question, CELEI was examined or approached through different framing lenses developed in the process of evaluation, which started to give shape to the institution. Internal structure, working model, human resource policy, institutional culture and intercultural environment, and the learning approach to implementing change were all part of this shaping process.

Evaluative Inquiry contributed to organizational development enacting a process of reflection and action that allowed the researcher to use theory and different frames to conceptualize CELEI as a small, institution, working as an educational provider in an intercultural context. This meant identifying fields of action and core processes, specifying organizational structure and personnel needs, and developing criteria, standards, and procedures in different areas, as well as envisioning learning as a built-in organizational strategy.
Organizational Structure

Evaluation data showed that the organization had a considerable asset both in human and academic resources. However, it also surfaced a loose structure characterized by lack of clear leadership and accountability line, poor communication system and lack of shared vision. An analysis of structural models suitable for a small education provider institution leads the researcher to propose the model of “professional bureaucracy”, following the Mintzberg model (1979). The structure will be built around the organization’s core processes: development, planning, and implementation of educational projects. The main fixtures of this structure are: (a) the horizontal matrix characterized by a small core permanent staff integrated into departmental functional teams, complemented by a diversified collaboration network of professors, professionals, education institutions and service providers; (b) strong management and coordination structure to support the development and planning of institution’s core processes and to coordinate functioning of the matrix structure of adjacent faculty and network of external collaborations, in the projects’ implementation phase; (c) lateral coordination required to manage this structure, with clear procedure protocols and line of accountability at team, inter project and management levels.
Working Model

The evaluation itself introduced a working model into CELEI which was strange to its working culture but had been very ingrained in the professional experience of its members. The model contemplated the structuring of CELEI activity around specific projects. By nature, projects were either a program delivered on a periodical base to a partner institution or a new program developed and implemented on an *ad hoc* base. Projects were handled through teamwork coordinated by a small core permanent staff and included a variety of temporary staff.

The trigger of the model was the evaluation frame – a collaborative effort of CELEI staff designed and implemented by an internal evaluation team. The evaluation process itself led to the visualization of the institution as a project-based organization that responds to the nature of the mission as an educational provider. Reflective practice led to ongoing implementation of change guided by evaluation findings that structured the institution around departmental functions and specific projects. Team work was also the direct effect of applying the evaluation team structure to new projects undertaken and new editions of programs offered to its clients on a periodical base.

The evaluation format had a major impact in introducing “learning by doing” as the unifying thread that meshed together the process. Team-building and reflective learning became structural parts of the project starting with the evaluation team and
reaching each of the new project-base teams created in CELEI. The evaluation team became a role model and an inspiration for other project teams. Team building materials and project design criteria developed for the evaluation were used to set up new teams. The relevance and quality of the cooperative evaluation as an outcome produced by a team with no prior experience, increased staff confidence in teamwork and learning by doing.

Human Resource Policy

The evaluation revealed human resources to be one of the most problematic aspects of the organization. CELEI inherited a varied workforce employed under very different conditions and only engaged temporarily to fulfill specific responsibilities always related to programs’ tasks. The creation of CELEI extended job responsibilities beyond programs’ tasks and also increased staff expectations regarding job stability and professional development.

“There is a situation of uncertainty and dissatisfaction about work and legal issues among CELEI’s professors. The same applies to the new dynamics and challenges CELEI’s management wants to implement and transmit to CELEI’s employees. Nonetheless, the involvement or commitment level they are willing to get according to the new company guidelines is not clear enough. It is necessary to search CELEI’s reference legal framework and to describe the work positions and remuneration means appropriately. CELEI also needs to identify the profile required of its professionals: academic training, professional experience, dedication level, flexibility, etc.” (Appendix I Evaluation Report).
To fulfill its mission, CELEI needed the contribution of a great diversity of skilled professionals composed of a small, skilled permanent work-force and the temporary involvement of qualified personnel and collaborating institutions. These human resource requirements determined a project-linked hiring policy focused on: (a) development of solid job descriptions and collaboration protocols that facilitate working relations and quality performance; (b) professional training built into the process of “task development” to ensure quality of performance of temporary and/or short-term personnel; (c) a human resources approach capitalizing on the capacity of the institution to generate meaningful projects and facilitate learning in order to attract and retain involved professionals and collaborating institutions.

Institutional Culture/Intercultural Context

The evaluation contributed enormously to the development of awareness about what the institution was and where it was going. It also created visual images and printed documents presenting the institution’s mission, policies, directions, and procedures, communication channels, and institutional relations, which facilitated internalization of the CELEI culture as it was adjusting during the restructuring change process. This process included the institution logo, professional portfolio, webpage, protocols and organization chart and preliminary drafts of job descriptions among anthers. The evaluation also surfaced an outstanding amount of documents related to
program implementation, library resources, teaching materials, etc. The evaluation has not only made them visible and accessible as common assets of the institution, but also helped people integrate these assets into their perception of the institution.

The evaluation showed that it was important for CELEI to develop a strong culture that would bind a diversity of people working on a network of interdependent roles and projects to implement the common goals of the institution. An important component of this culture was the learning nature of the institution which framed the organization’s approach to each project undertaken, and the work-model it developed with its employees and collaborators.

Particular attention was paid to the institution’s identity as an educational institution within the Spanish legal system. For the most part, higher education in Spain is in the hands of public universities and non-formal education is either controlled by government agencies or low rank private schools. CELEI had to find its position in the Spanish educational legal frame and define academic standard requirements, staff policy, and public image as an institution working on intercultural education and training in the fields of higher education, secondary education, and continuing education accordingly.

An analysis of the inherited culture of CELEI reveals significant cultural patterns derived from the history and identity of the institution. Having evolved from a loose, home-made organization bound to a strong leader figure, it has acquired a very
informal and dependent working culture. This model fit the prevalent working culture in Spain and, consequently, the established working cultural patterns of CELEI staff.

On the other hand CELEI management and clients come from an American working tradition which stresses autonomy, teamwork and formal procedures. This intercultural gap represents a serious challenge in generating procedures and practices that will be accepted by all and will enable the institution to perform within an intercultural context.

The evaluative inquiry brought to the surface certain values, assumptions, and attitudes of CELEI members which had not been previously identified. In addition, the evaluative inquiry raised management awareness to the impediments and opportunities that cultural differences represent for the advancement of the institution.

The cooperative model of evaluation allowed the researcher to have the input of the Spanish staff that facilitated implementation of appropriate adaptations required in order to make the evaluation relevant to the institution and meaningful for the participants. At the same time, working in a small team and learning to design evaluations allowed Spanish staff to become acquainted and familiarized with evaluative inquiry rational and procedures.

Learning Approach to Implementing Change
Using evaluation as a guideline to implement change has served two clear purposes in CELEI. On the one hand, it framed the change process in an evaluative reflection that generated shared knowledge of the organization’s identity, its strengths and weaknesses, and its projection into the future, along with a set of recommendation which determine the direction of change.

On the other hand, it used the evaluation logic and principles to frame the institutional project-learning approach. The phase of applying evaluation recommendations began a new cycle of experiential learning focused on team-based organizational and project development.

An additional effect of the evaluation in CELEI, framed as an experiential learning cycle, was the possibility of applying the evaluative inquiry approach of team and project development to a training intervention in a Spanish secondary school. The evaluation process had generated academic materials, technical skills, and an organizational capacity to start providing professional trainings for the Spanish education system, opening a new line of activity for the institution. This expansion of CELEI’s portfolio of activities was much welcomed and provides new avenues of revenue-generation for an organization undergoing increasing challenges within its professional sector.
SELF REFLECTION AND LEARNING

This section includes my reflections on the personal factor as a key to understanding the transformation experienced by CELEI in the course of the evaluative inquiry process. It also addresses the personal knowledge I gained in the course of leading the evaluation and the change process and how these would be translated into managerial decisions.

Also, it is important to note that every action research project is very context-bound and CELEI presented three main features that made the unique experience presented in this paper possible. The first feature was the small size of the organization in terms of core staff, along with the number and scope of the programs delivered. This circumstance allowed the intervention to encompass the whole organization and to start implementation very early in the process. The second was the “academic frame” of the experience, which ensured theoretical background, identification of goals and criteria, and methodological rigor to the intervention. The third feature was the relevance of the personal factor in the CELEI context.

The Personal Factor
Multi-Role of the Researcher: This was the weaving thread for building the appropriate learning structure and practicing developmental self-evaluation. It facilitated resources, provided expertise, encouraged involvement, and ensured development of materials and implementation plans.

Institutionalization of the Researcher’s Roles: This was a pillar of the institution during the change process at CELEI. Not only was the researcher knowledgeable about the institution and familiar with the different roles, but the staff had also internalized an image of the researcher and had conformed to a loose vertical structure of authority. In the transition period, the level of structure was low. In operational tasks, the old vertical structure kept the programs and projects running efficiently, while the process tasks were approached from a learning frame, taking the horizontal structure as a basis to work on team-building and develop lateral coordination support systems.

Consolidation of a Learning Structure: This was an outcome of the evaluative inquiry intervention that was also strongly influenced by the personal factor as the researcher had the commitment and authority to implement evaluation recommendations in the form of a strategic plan that would guide the change process, consolidating CELEI as a learning institution. In addition, the researcher could provide the necessary training support.

The personal factor had a very positive impact in the CELEI evaluation but it also represented two important challenges:
First, the sharing of authority, functions, and responsibilities, which had previously been so heavily concentrated on the leader figure, needed to change. In the first phase, the researcher had to use a strong leadership position to integrate learning into the operational model of the institution. In addition, working teams had to be created and an organizational structure prepared. In the second phase, the researcher had to introduce a purposeful process of delegation to allow redistribution of CELEI management and coordination functions and responsibilities between several job positions, detaching them from a one-person leadership.

Second, efforts had to be made to turn this initial learning experience, initiated and maintained by the researcher’s personal initiative, input and energy, into a common strategy supported and valued by CELEI staff, collaborators, and partner institutions. Only then the institution would be able to consolidate itself as a private international education provider, thus becoming viable and sustainable.

**Researcher/Manager Challenges**

These final remarks will address challenges faced by the researcher in the course of implementing evaluative inquiry as a tool for institutional development and reflecting on the role of the experiential learning approach in articulating the process and framing learning in the institution.

The researcher faced intellectual challenges in gaining theoretical understanding of: organizations, management, evaluation and training; need of “know-how” for
developing protocols, procedures and training materials; serious intercultural issues in accommodating different working styles; strong group dynamic manifestations of resistance and open conflict; and multi-role complexity.

Experiential learning as a tool of self-learning and training was the natural approach of the researcher as a consequence of her long-term professional practice tradition as a teacher and trainer. Internalizing experiential learning as a personal style of self-learning during a five year period of academic work enacted a spiral of experiential learning phases in CELEI, which were primarily researcher self-learning cycle experiments in project-based working teams consequently integrated into a larger academic self-directed learning.
CONCLUSION

This section synthesizes the most important outcomes of the research with the aim of presenting usable knowledge that could be of benefit to others in the field. It also expresses the limitations of the study and challenges faced by the researcher and the institution in progressing to the next step, which is the implementation of evaluation recommendations.

Though action research is always situation specific, there are clear organizational features that present specific challenges: small size; one individual initiative; poor cohesion; changing nature of the service offered; intercultural context etc. I will first present the results or lessons learned by the organization as a whole and then specifically by the researcher/manager.

Outcomes for the Organization

- Evaluative inquiry offered the opportunity to conceptualize the organization as a dynamic system, made up of interrelated parts. It enabled participants to engage in reflection about the way different parts of the system are held together and patterns of interaction.

- Evaluative inquiry was a good tool for revealing members’ professional position inside the organization, generating common understanding about relevant
organizational issues and facilitating consensus around vision and mission. It also provided a less threatening procedure for assessing organizations’ weak and strong areas, with a focus on improvement and people’s involvement.

- Evaluation using internal resources increased the know-how in areas such as evaluation criteria, evaluation instruments, analysis and interpretation of data, decision making, or writing and presentation skills. The evaluation process also fosters learning about teamwork, group dynamics, cultural differences and conflict resolution.

**Outcomes for the Researcher/Manager:**

Implementation of evaluative inquiry in the role of researcher and manager allows for second and third loop learning in action and reflection, which tests previous assumptions. Most important outcomes include:

- Action research enabled me to understand the differences between management and employee positions in the organization, along with the way these positions affect access to information, view of the system, understanding of organizational issues, decision-making mechanisms, and a sense of responsibility and involvement. This needs to be translated into the design of a structure with an appropriate distribution of responsibilities and a clear line of authority and accountability.
It also helped me gain a global view of CELEI and its interrelated components and to see the need to align the services it provides and the scope of its activities with organizational structure and human resource policy, ensuring financial viability, high quality performance and staff satisfaction.

The research allowed me to explore leadership roles and leadership styles and reflect on how they impact the organization in terms of collaborative work, social responsibility and commitment to professional development learning.

The process fostered strengthening of the existing training, designing and leading capacities of the researcher/manager, facilitating new skills practice and raising awareness about personal challenges and limitations.

**Limitations and Challenges**

The limitations of this study were primarily related to time constraints and the forced pace imposed on the process. Time limitations affected the depth and breathing room and the forced pace required a much more directive role of the part of the researcher.

In the context of action research, this study is not a finished product, but the groundwork for the implementation phase. The important challenges I foresee in this new phase are: the balancing of task and process oriented activities within workload distribution; defining achievable goals and indicators to measure...
progress; maintaining sustained commitment and involvement in the learning approach; connecting with other professionals or institutions embarked in similar learning processes for mutual support and inspiration.
BIBLIOGRAPHY


Blanchard Training and Development Inc. Escondido, CA


Appendix A  Definitions

**Data Generation** – In action research data comes through engagement with others in the research cycle. Therefore, it is important to know that acts which are intended to collect data are themselves interventions…. Accordingly it is more appropriate to speak of data *generation* than data gathering. (Coghlan, D. & Brannick, T. 2001: 90)

**Action Research** - Action research is an iterative inquiry process that balances problem solving actions implemented in a collaborative context with data-driven collaborative analysis or research to understand underlying causes enabling future predictions about personal and organizational change (Reason & Bradbury, 2001).

**Evaluative Inquiry** - Methodology introduced by Preskill and Torres (1999) to enhance learning in organizations Evaluative Inquiry implies that the evaluating team sees its role as that of an informed facilitator providing the structure for a process of common sense making. Evaluative inquiry approaches evaluation as a learning experience using dialogue, reflection and challenge to distil learning opportunities, to create a learning environment and to develop inquiry skills.

**Learning Organizations** - Organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where
collective aspiration is set free, and where people are continually learning to see the whole together.
(Peter Senge 1990: 3)

**Project-Based Learning** – Project-based learning is about using projects as a vehicle to create a learning context: setting the stage for reflective practice and inquiry at all levels within the organization, to reveal deeper aspiration and construct shared understanding. It is about acquiring habits of reflective practice in the project environment to benefit the individual, the organization and society. (Ayas, C. & Zeniuk N. 2004: 272)

**Professional Bureaucracy** – Organizational structure with a large operating core, relative to its other structural parts. Professional bureaucracies are flat, decentralized structures: control is provided mainly by professional indoctrination of its members. The support staff exists to serve the professionals, who carry out the primary responsibilities. (L. Bolman & T. Deal 1991: 88)

**Self-Reflection** – Self-examination, a reflective examination (as of one’s beliefs or motives). (Merriam Webster Online Dictionary, www.m-w.com)
## Appendix B  
### CELEI’s Evaluation Areas Framework

### EQUIPMENT

<table>
<thead>
<tr>
<th>CONCEPTS</th>
<th>INDICATORS</th>
<th>INSTRUMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Location</td>
<td>- A favorable location</td>
<td>- Location map</td>
</tr>
<tr>
<td></td>
<td>- Historic/cultural atmosphere</td>
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<tr>
<td></td>
<td>- Existence of some other similar centers in the area</td>
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</tr>
<tr>
<td>*Facilities</td>
<td>- Number of classrooms</td>
<td>- Observation</td>
</tr>
<tr>
<td></td>
<td>- Number of offices</td>
<td>- Questionnaire</td>
</tr>
<tr>
<td></td>
<td>- Number of common spaces</td>
<td>- Photographs</td>
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<td></td>
<td>- Number of toilets</td>
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<td>- Available meeting room</td>
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<td>- Open spaces</td>
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<td>- Emergency exits</td>
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<td>- Premises suitable for use</td>
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<td></td>
<td>- Premises are of an appropriate size</td>
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<td>- Premises have the equipment in agreement with needs</td>
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<tr>
<td></td>
<td>- Premises have a suitable decoration for their use</td>
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<td></td>
<td>- Good lighting is available</td>
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<td>- Suitable temperature</td>
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<td></td>
<td>- Spaces are clean and organized</td>
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<tr>
<td>*Furniture (tables, chairs,</td>
<td>- Sufficient amount of furniture</td>
<td>- Photographs</td>
</tr>
<tr>
<td>blackboards, racks…)</td>
<td>- Appropriate design for their use</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Quality and resistance suitable for use</td>
<td>- Quantitative observation</td>
</tr>
<tr>
<td></td>
<td>- Comfortable to be used for several hours</td>
<td>- Questionnaire</td>
</tr>
<tr>
<td>*Technological/office</td>
<td>- Sufficient amount of materials</td>
<td></td>
</tr>
<tr>
<td>(computers, photocopiers,</td>
<td>- Are appropriate</td>
<td>- Photographs</td>
</tr>
<tr>
<td>projector, video, T.V.,</td>
<td>- Are obsolete</td>
<td>- Quantitative observation</td>
</tr>
<tr>
<td>paper, scissors, mark…</td>
<td>- Are adjustable to current needs and new project</td>
<td>- Questionnaire</td>
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<tr>
<td></td>
<td>- Sustainability of technical equipments is seen</td>
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<tr>
<td></td>
<td>- There is a person in charge of maintenance</td>
<td></td>
</tr>
<tr>
<td>*Capacity, accessibility</td>
<td>- The number of programs and participants is adequate</td>
<td>- Documentation</td>
</tr>
<tr>
<td>CELEI’s space</td>
<td>Questionnaire</td>
<td>Observation</td>
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<tr>
<td>Accesses meet all legal requirements.</td>
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</tbody>
</table>

* Contingency and safety systems
- There is a fire-prevention system
- There is insurance for theft, fire, flood, etc.
- There is public liability insurance
- Safety equipment meets all legal requirements
- Users are aware of safety systems
- Users know how to proceed in case of an emergency
- Maintenance and accesses are controlled

### HUMAN RESOURCES

<table>
<thead>
<tr>
<th>CONCEPTS</th>
<th>INDICATORS</th>
<th>INSTRUMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staffing</strong></td>
<td>- There is a scheme of staff needs</td>
<td>Documentation: resume contracts…</td>
</tr>
<tr>
<td></td>
<td>- Staff members are aware of their labor situation (temporality)</td>
<td>- Group dialog</td>
</tr>
<tr>
<td></td>
<td>- There is a high level of commitment and dedication</td>
<td>- Interviews (Questionnaire)</td>
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<tr>
<td></td>
<td>- Staff members are experienced and specialized roles</td>
<td></td>
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<tr>
<td></td>
<td>- There are staff selection criteria</td>
<td></td>
</tr>
<tr>
<td><strong>CELEI’s staff knowledge programs</strong></td>
<td>- The staff knows the programs that WL/SIT offers through webpage</td>
<td>Documentation (CEL)</td>
</tr>
<tr>
<td></td>
<td>- The staff is aware of the programs offered by the webpage</td>
<td>- Structured interview</td>
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<tr>
<td></td>
<td>- The staff has information about future projects</td>
<td></td>
</tr>
<tr>
<td><strong>Expectations of the members</strong></td>
<td>- The staff has medium-term labor expectation; formulas</td>
<td>Group dialog</td>
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<td></td>
<td>- The staff has a positive, negative or skeptical attitude towards the new organization</td>
<td>- Structured interview</td>
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<tr>
<td></td>
<td>- There is a good level of commitment</td>
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<td></td>
<td>- The staff regards the new organization as an opportunity…</td>
<td></td>
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<tr>
<td><strong>Training needs</strong></td>
<td>- The staff presents a training level appropriate to the challenges</td>
<td>Group dialog</td>
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<tr>
<td></td>
<td>- There is a need of continuing training: seminars, workshops, conferences…</td>
<td>- Structured interview</td>
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<tr>
<td></td>
<td>- The staff needs a foreign language competence</td>
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</tr>
</tbody>
</table>

71
agreement with the new challenges. Staff is effec-
tive and there are enough technical resources: internet, Power Point, over-
head projectors...
- Training is needed in other areas: evaluation,

<table>
<thead>
<tr>
<th>Legal aspects</th>
<th>- The staff is aware of its legal situation</th>
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<tbody>
<tr>
<td></td>
<td>- They know the labor regulations</td>
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<td>- They know the rule or consequences in case of work leaves.</td>
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<td>- There are mandatory medical examinations</td>
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<td>- They know or have been trained in “Risk prev-</td>
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<td>ently at the workplace”</td>
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<td>- They know about benefits (professional or busi-</td>
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<td>nes, deductions, taxes, unemployment bene-</td>
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</table>

- Documentation: GES agreements…
- Structured interviews

**INTERNAL OPERATIONS SCHEME**

<table>
<thead>
<tr>
<th>CONCEPTS</th>
<th>INDICATORS</th>
<th>INSTRUMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>*CELEI’s internal scheme</td>
<td>*There is an appropriate scheme for covering the aim of the organization</td>
<td>*Questionnaire</td>
</tr>
<tr>
<td></td>
<td>*CELEI’s departments have defined tasks</td>
<td>*Documentation analysis</td>
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<tr>
<td></td>
<td>*It is staffed appropriately</td>
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<td></td>
<td>*The staff is trained for carrying out their tasks</td>
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<tr>
<td>*Team Work</td>
<td>*CELEI promotes team work</td>
<td>**Questionnaire</td>
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<tr>
<td></td>
<td>*There are working teams</td>
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<td></td>
<td>*There are working rules</td>
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<td></td>
<td>*Team roles are defined</td>
<td></td>
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<tr>
<td></td>
<td>*Achievements</td>
<td></td>
</tr>
<tr>
<td>*Existing protocols and development</td>
<td>*There are development protocols for all programs</td>
<td>*Questionnaire</td>
</tr>
<tr>
<td>protocols</td>
<td>*Protocols define tasks and responsibilities</td>
<td>*Documentation analysis</td>
</tr>
<tr>
<td>and responsibilities</td>
<td>*The staff knows and uses protocols</td>
<td></td>
</tr>
<tr>
<td>*Communication between staff members</td>
<td>*There is a clear accountability scheme</td>
<td>*Questionnaire</td>
</tr>
<tr>
<td></td>
<td>*Communication channels are clear</td>
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<td></td>
<td>*Accessibility to the information needed to work</td>
<td></td>
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<tr>
<td>*Documentation and access to</td>
<td>*There is an adequate documentary base of policies, records, and programs</td>
<td>*Questionnaire</td>
</tr>
<tr>
<td>information</td>
<td>*There is a general file system</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*Documents are accessible to staff</td>
<td></td>
</tr>
<tr>
<td>*Evaluation systems</td>
<td>*CELEI evaluates the quality of its programs</td>
<td>*Questionnaire</td>
</tr>
<tr>
<td>CONCEPTS</td>
<td>INDICATORS</td>
<td>INSTRUMENTS</td>
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<tr>
<td>---------------------</td>
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</tr>
<tr>
<td><em>Market introduction</em></td>
<td><em>We know the nature of the programs we want to offer</em>&lt;br&gt;<em>We know if there is a viable market for our programs</em>&lt;br&gt;<em>We know this market</em>&lt;br&gt;<em>We have a market introduction strategy</em>&lt;br&gt;<em>We know our competitors</em></td>
<td><em>Questionnaire</em></td>
</tr>
<tr>
<td><em>Target clients</em></td>
<td><em>Our current customers are enough for CELEI’s sustainability</em>&lt;br&gt;<em>Our projects are interesting for different kinds of customers</em>&lt;br&gt;<em>Our programs are significant to these customers</em>&lt;br&gt;<em>Customers are satisfied with our services</em></td>
<td><em>Questionnaire</em></td>
</tr>
<tr>
<td><em>Marketing</em></td>
<td><em>There is a marketing plan</em>&lt;br&gt;<em>There are appropriate materials</em>&lt;br&gt;<em>There are enough financial resources to carry it out</em>&lt;br&gt;<em>There are human resources…</em>&lt;br&gt;<em>These human resources have an appropriate preparation</em></td>
<td><em>Questionnaire</em>&lt;br&gt;  <em>Documentation analysis</em></td>
</tr>
<tr>
<td><em>Strategic planning</em></td>
<td><em>There are viable marketing projects</em>&lt;br&gt;<em>Staff is involved in developing and carrying out these projects</em>&lt;br&gt;<em>There is a comprehensive action plan</em>&lt;br&gt;<em>There is a clear timeline for those projects</em>&lt;br&gt;<em>Long and short term goals have been set.</em></td>
<td><em>Questionnaire</em></td>
</tr>
<tr>
<td><em>Financing</em></td>
<td><em>CELEI has a variety of sources of financing</em>&lt;br&gt;<em>Our current programs allow CELEI’s sustainability</em>&lt;br&gt;<em>Current programs’ financing is appropriate considering CELEI offers.</em>&lt;br&gt;<em>CELEI’s external financing possibilities are known.</em>&lt;br&gt;<em>There is a search for a financing plan</em>&lt;br&gt;<em>CELEI has a streamlined economy</em>&lt;br&gt;<em>CELEI has an appropriate economic management system</em>&lt;br&gt;<em>There is an appropriate system for cost control</em></td>
<td><em>Questionnaire</em>&lt;br&gt;  <em>Documents analysis</em></td>
</tr>
<tr>
<td><em>External collaboration</em></td>
<td><em>Who are the present collaborators</em>&lt;br&gt;<em>Benefits from those collaborations</em>&lt;br&gt;<em>External collaborations useful for CELEI</em>&lt;br&gt;<em>CELEI has a clear idea of the kind of collaborations it needs</em>&lt;br&gt;<em>CELEI is attractive for potential collaborators</em>&lt;br&gt;<em>There is a plan to expand our pool of collaborators</em></td>
<td><em>Questionnaire</em></td>
</tr>
</tbody>
</table>
Appendix C   Evaluation Design

Purpose
To take the opportunity offered by the new management of the institution to cooperatively explore the present situation of the organization and take the appropriate measures to project CELEI as a high quality and sustainable institution.

Stakeholders:
CELEI management and staff
Enlaces-Links
World Learning as a “Partner Institution”

Areas of Interest for Evaluation

Equipment
Location
Physical space
Equipment
Technology
Maintenance
Legal Aspects

Human Resources
Staff remuneration
Multi-functionality of the work positions
CELEI staff’s knowledge of the programs
Expectations of the organization staff members
Training needs
Legal aspects

Internal Operations
CELEI’s internal operation
Team work
Protocols/procedures
Communication between staff members
Documentation and accessibility
Evaluation systems
Sustainability
Our integration into the labor market
Target clients
Marketing
Strategic plan
Financing
External collaborations

**Evaluation Instruments:**
Group dialogue
Questionnaire
Documentation study
Observation

**Evaluation Calendar:**
Group dialogue: November 25th – 26th
Information collection: November 27th – January 20th
Data analysis: March 25th – April 15th
Elaboration of report: April 20th - May 15th
Results presentation: May 18th

**Documents:**
Questionnaire
Observation guide
Documents study guide
Group dialog requirements
Group dialog rules
Responsibilities of: Facilitator, Process Observer, Recorder and Expert

**Materials**
Computers, printer, and video camera, voice recorders, camera, CD player…
Brown paper, cards, poster boards and sheets of paper
Markers, crayons, scissors, tape, glue…
Flip-charts and stand-support
COOPERATIVE EVALUATION SEMINAR

Purpose
To use a reflection exercise for CELEI and staff insertion into the organization through an evaluative process that will enable us to build together a view and a mission, and identify the current situation of the organization reaching a consensus on appropriate actions to take in order to achieve the goals we set.

Goals
Become aware of our professional role in CELEI
Learn about the organization as a new educative project
Work as a learning community by means of evaluation

Objectives
The seminar will facilitate participants to:
- Share knowledge, beliefs and attitudes towards CELEI as a team educative project
- Become acquainted with a different CELEI
- Gain understanding of CELEI’s strengths and weaknesses
- Recognize the role that each member has in CELEI’s projects
- Get involved in specific learning and project developing actions
- Recognize team work as CELEI’s development formula
- Become acquainted with the internal evaluation process
- Improve their team work skills

Activities
- Teambuilding
- Group dialogue on the meaning of CELEI and how do we perceive our professional development inside this organization?
- What is CELEI? Strengths and weaknesses
- Dreaming of a future
- Starting to bridge the gap
TEAMBUILDING SESSION

Purpose:
Working on the essential elements for being effective as a team and getting the group acquainted with the Evaluation Seminar

Goals:
Get them familiarized with team work
Get them familiarized with the Evaluation Seminar design and calendar
Define the Evaluation Seminar as a cooperative learning exercise.

Objectives
This session will make participants:
- Get familiarized with the basics of team work
- Recognize the main roles of the team members and their responsibilities
- Become aware of their roles as a team member and the responsibilities it entails
- Create a positive atmosphere of cooperative learning and team work

Activities:
- Session introduction (15 minutes)
- Presentation of different elements of team work and the role of the evaluation team members with the aid of posters (20 minutes)

Present the basics of team work:
- Suggest and decide the basic working rules (30 minutes)
- Self-reflection exercise about team rules and participants’ responsibilities
- Present PGOs (10 minutes)
- Present the seminar calendar (15 minutes)

Documentation / Materials
Team work requirements guidelines
Dialogue rules’ poster
Roles and responsibilities poster
PGOs poster
Seminar agenda
Purpose:
To think about behaviors that help or hinder good team work and to become aware of the way they affect us as participants in team work.

Directions
Individually: Consider the rules established for the team, consider if they are all assumable and write down three that seem easy to follow and three that seem difficult to follow. Think about the effect they may have on team working.

<table>
<thead>
<tr>
<th>Behaviors that help or hinder</th>
<th>Effects</th>
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In group. Share information, express ideas and ask questions. Agree and assume the group rules to work during the seminar.
**Group Dialogue**

What does CELEI mean for me? How do I perceive my professional development inside this organization?

**Purpose**
To facilitate team member cohesion by means of a reflective exercise about CELEI and our professional position inside the organization.

**Group dialogue rules**
- All opinions are valid
- We have the right to express ourselves
- We must listen
- Avoid judgments
- We do not oppose ideas in form of discussion
- We contribute to the dialogue honestly
- All opinions are respected

**Directions**
- The facilitator suggests a dialogue topic and gives two minutes for self-reflection.
- Participants raise their hands to talk about the topic.
- When talking, we need to have the microphone
- Interventions cannot exceed “59 seconds”
- Always follow the facilitator’s guidelines

**Dialogue themes** (30 minutes for each topic)
1. What does CELEI mean for me?
2. How are we performing our respective roles within the organization?
3. How is interaction among CELEI members?
4. How do I perceive my professional development in this organization?

**Materials**
Facilitator documentation
Recorder
**WHAT IS CELEI? STRENGTHS AND WEAKNESSES**

**Purpose:**
To cooperatively understand CELEI’s strengths and weaknesses and the effects they have on the organization.

**Directions:**
**Individually (15 Minutes)**
Read the following list of items that are usually perceived as strengths and weaknesses in an organization. Write down the five you consider most significant for CELEI and specify their effects on the organization.

**In group (30 minutes)**
We discuss the list of strengths and weaknesses all together and agree on a final group list.

**In teams (45 minutes)**
In a team session, we analyze both lists and the effects and agree on a final team list.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Effects on the organization</th>
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<table>
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<tr>
<th>Weaknesses</th>
<th>Effects on the organization</th>
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</tbody>
</table>
KEY STRENGTHS AND WEAKNESSES LIST

Leadership
Administrative
Rules setting and management
Development of support resources
Ensuring all tasks are carried out

Identity
Knowledge of who we are and what we do well
Organization’s mission
Understanding of our specialty
Specialization areas (as experts)

Institutional culture
Attitude towards work
Values and beliefs
Rules

Management model
Legal background
Decision-making process
Employees’ representation
Management establishment method

Organizational structure
Roles and responsibilities
System coordination
Authority Structure
Communication

Financing system
Financial planning
Management
Bank and cash disbursement control
Financial support possibilities

Communication in the Intercultural Education field
Professional networks we belong to
Kinds and nature
Use we make of these connections
Outreaching

**Collaborations**
Kind
Number
Advantages and disadvantages
Monitoring process

**Human Resources**
Staff remuneration
Staff specialization and preparation
Staff dedication and loyalty
Equity policy
Compensations and incentives

**Planning mechanisms**
Needs identification
Alternatives consideration
Goals setting

**Problem resolution and decision-making system**
Problem definition
Data collection
Creation of alternatives
Decisions control

**Monitoring and Evaluation**
Processes monitoring
Data collection
Reports elaboration
Use of findings

**Sustainability**
Quality and specialization of the projects developed in CELEI
Development of sustainable projects
Quality/Cost efficiency of services
Good relations with beneficiaries
DREAMING OF THE FUTURE

Purpose:
To generate a shared view of what CELEI will be in 3 years and develop the ability of communicating this view professionally

Background
CELEI will attend the annual CIEE conference in France in 2009. This conference includes a session where different organizations have an opportunity to present themselves in this specialized forum.

Directions:
First session (75 minutes)

In two groups, create 10 minute-long presentations
Each presentation needs to include:
CELEI’s mission
Clients and collaborators portfolio
Description of our most important achievements
Proof of our singularity and role in the education field

Write down the principal items of the presentation and prepare materials for it. Decide who will carry out the presentation and how

Second session
Group presentations (30 minutes)
Joint elaboration of a common view (40 minutes)

Materials:
Computers, printer, and video camera, camera, CD player…
Brown paper, cards, poster boards and sheets
Markers, crayons, scissors, tape, glue
Flip-chart, stand-support
Purpose:
To cooperatively elaborate a basic scheme of actions to begin to put to reality CELEI’s view for the future.

Directions:
Individually (10 Minutes)
Make a list of actions that you think may be relevant to achieve the goals we have set for CELEI

In two groups (30 minutes)
In groups, discuss the list of actions and agree on a final group list

In a team (50 minutes)
In a team session, analyze both lists and agree on a final team list.

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<tr>
<th>Short-term actions</th>
<th>Medium-term actions</th>
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Sessions Agenda

25/11
9:45  Welcome
10:00-11:30  How to work in teams
11:30-12:00  Break time
12:00-14:00  What does CELEI mean for you?
14:00  Lunch
16:30-18:30  Strengths and Weaknesses
18:30  Break time
19:30-21:00  Dreaming the future I
21:00  Dinner
21:30  Sharing a fun evening

26/11
9:00  Breakfast
10:00-11:30  Dreaming of the future II (Presentation)
11:30  Break time
12:00-14:00  filling “the gap”
14:00  Closing
15:00  Lunch in Maitena
Appendix D  Data processing guidelines

DATA PROCESSING CRITERIA

- What kind of evaluation fields do data inform about?
- Data analysis: Which information do these data give?
- Assessment

RECOMMENDATIONS CREATION

- What evidences do recommendations support?
- Do recommendations cover all analyzed aspects?
- Were CELEI’s background, logistics and limitations considered for each recommendation?
- What values, beliefs and assumptions are reflected in each recommendation?

RESULTS PRESENTATION

- Who are the report’s stakeholders
- What has to be informed to each stakeholder
- Which is the appropriate format for each of them?

RECOMMENDATIONS

To create a data base in order to facilitate professional learning
Appendix E  

Staff Questionnaire

CELEI: CENTRO DE LENGUAS Y EDUCACIÓN INTERCULTURAL
Antonia Pérez Bolívar. Granada, 09/28/06

The main purpose of this questionnaire is obtaining base line data about CELEI’s situation and also your position in this organization. Please, answer openly and sincerely and make your comments as precise as possible. Once it is filled out, please send it to me from CELEI e-mail, so I receive it anonymously.

Cross one of the options that refer to your level of agreement with the statements below considering the following.

A) I strongly disagree
B) I disagree
C) I partly agree
D) I agree
E) I strongly agree
F) I do not know

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<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
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<tbody>
<tr>
<td>1. CELEI is a pleasant place to work</td>
<td>2</td>
<td>2</td>
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<td>2. I have a clear idea of how CELEI sees it years.</td>
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<td>3. I feel my salary is competitive in comparison similar institutions.</td>
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<td>4. I have a clear understanding of my objectives this year.</td>
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<td>5. There are sufficient participation channels</td>
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<td>6. I usually do not know what is going on in the organization</td>
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<td>2</td>
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<td>7. CELEI values its employees</td>
<td>1</td>
<td>3</td>
<td>3</td>
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<td>8. CELEI’s hiring policy is fair</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>3</td>
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<td>9. CELEI is well managed</td>
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<td>1</td>
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<td>10. Female and male employees are treated equally</td>
<td>1</td>
<td>2</td>
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<td>11. CELEI strongly supports staff training and development</td>
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<td>Professional Development</td>
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<td>12.</td>
<td>I am satisfied with my work space</td>
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<td>13.</td>
<td>We have the leadership the organization needs to be a success</td>
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<td>14.</td>
<td>I believe that when my performance improves my earnings will improve</td>
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<td>15.</td>
<td>Staff training is a priority in CELEI</td>
<td>1</td>
<td>1</td>
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<td>16.</td>
<td>CELEI manages its technological resources effectively</td>
<td>1</td>
<td>3</td>
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<tr>
<td>17.</td>
<td>I relate well to my co-workers</td>
<td>3</td>
<td>2</td>
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<td>18.</td>
<td>I understand how my work is inserted in the general scheme</td>
<td>5</td>
<td>1</td>
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<tr>
<td>19.</td>
<td>The technological resources at CELEI perform and carry out my work efficiently and productively</td>
<td>5</td>
<td>1</td>
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<td>20.</td>
<td>I believe that my personal contribution is significant</td>
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<td>21.</td>
<td>Sufficient opportunity is given for professional advancement</td>
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<td>22.</td>
<td>I understand what CELEI needs to do to achieve its goals</td>
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<td>3</td>
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<tr>
<td>23.</td>
<td>Our clients get their money’s worth</td>
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<td>1</td>
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<tr>
<td>24.</td>
<td>The formal problem-solving processes are effective</td>
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<td>1</td>
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<tr>
<td>25.</td>
<td>All employees are treated equally</td>
<td>2</td>
<td>1</td>
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<tr>
<td>26.</td>
<td>My colleagues are competent, qualified professionals</td>
<td>4</td>
<td>3</td>
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<tr>
<td>27.</td>
<td>I don’t have difficulties communicating with my colleagues in CELEI</td>
<td>1</td>
<td>1</td>
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<td>28.</td>
<td>CELEI offers me sufficient opportunities to participate in job-related training</td>
<td>1</td>
<td>1</td>
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<tr>
<td>29.</td>
<td>I believe that the performance-review system is fair</td>
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<td>30.</td>
<td>My work schedule is reasonable</td>
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<td>31.</td>
<td>CELEI does a good job of correcting any mistakes it makes with its clients</td>
<td>3</td>
<td>2</td>
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<td>32.</td>
<td>I communicate effectively with my supervisor</td>
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<td>3</td>
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<td>33.</td>
<td>The service we provide to clients is improved</td>
<td>3</td>
<td>3</td>
<td>1</td>
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<td>34.</td>
<td>I know what our corporate values are</td>
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<td>35.</td>
<td>My current earnings reflect my performance</td>
<td>3</td>
<td>2</td>
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<tr>
<td>36.</td>
<td>My supervisor(s) has (have) good people skills</td>
<td>1</td>
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<tr>
<td>37.</td>
<td>I see how I can help CELEI achieve its goals</td>
<td>1</td>
<td>4</td>
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<tr>
<td>38.</td>
<td>I support CELEI’s corporate values</td>
<td>1</td>
<td>3</td>
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<tr>
<td>39.</td>
<td>CELEI is open to my ideas and suggestions</td>
<td>3</td>
<td>3</td>
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<td>40.</td>
<td>Promotions are based primarily on performance</td>
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<td>41.</td>
<td>I have an appropriate workload</td>
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<td>3</td>
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<tr>
<td>42.</td>
<td>I believe that CELEI is an equal-opportunity employer</td>
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<tr>
<td>43.</td>
<td>Team-work with my co-workers in CELEI</td>
<td>1</td>
<td>1</td>
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<td>44.</td>
<td>Meetings are productive</td>
<td>3</td>
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<td>45.</td>
<td>There is a good monitoring of the implementation of the new agreements</td>
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<tr>
<td>46.</td>
<td>CELEI helps me identify training areas for professional development</td>
<td>3</td>
<td>2</td>
<td>2</td>
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<td>47.</td>
<td>We have standard procedures that help us to provide a better service to clients</td>
<td>3</td>
<td>2</td>
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<tr>
<td>48.</td>
<td>CELEI’s management has no shortcomings</td>
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<td>2</td>
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<tr>
<td>49.</td>
<td>I receive appropriate support to make use of my qualities and overcome my shortcomings</td>
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<tr>
<td>50.</td>
<td>I am proud of the work I do</td>
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<tr>
<td>51.</td>
<td>CELEI places strong emphasis on innovation</td>
<td>1</td>
<td>3</td>
<td>1</td>
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<tr>
<td>52.</td>
<td>CELEI has a clear organizational vision</td>
<td>1</td>
<td>1</td>
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<td>53.</td>
<td>There is good communication throughout the organization</td>
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<tr>
<td>54.</td>
<td>CELEI is committed to career development in the organization</td>
<td>1</td>
<td>4</td>
<td>1</td>
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<td>55.</td>
<td>There are opportunities to promote within the organization</td>
<td>3</td>
<td>3</td>
<td>1</td>
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<tr>
<td>56.</td>
<td>I believe CELEI offers high-quality services</td>
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<td>2</td>
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<tr>
<td>57.</td>
<td>CELEI has a cooperation policy with other organizations</td>
<td>1</td>
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<tr>
<td>58.</td>
<td>CELEI has strong organizational values</td>
<td>4</td>
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<tr>
<td>59.</td>
<td>CELEI has an organizational feedback system</td>
<td>2</td>
<td>1</td>
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<tr>
<td>60.</td>
<td>I can see a long-term future for myself in CELEI</td>
<td>3</td>
<td>2</td>
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<tr>
<td>61.</td>
<td>I know how to contribute to different programs of CELEI</td>
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<td>2</td>
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<tr>
<td>62.</td>
<td>CELEI has a good benefits package for its employees</td>
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<tr>
<td>Question</td>
<td>Response Distribution</td>
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<tr>
<td>63. There is a good work environment in CELEI</td>
<td>1 3 3</td>
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<td>64. I like working in CELEI</td>
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<tr>
<td>65. CELEI is well equipped to compete in its industry</td>
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<tr>
<td>Total</td>
<td>12 86 140 114 52 51</td>
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<tr>
<td>Percentage</td>
<td>2.6 18.9 30.7 25.2 11.4 11.2</td>
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**Additional comments:**

This section is meant to give specific information about issues you wish to clarify or unmentioned aspects that you would like to give your opinion on.

**Questionnaire #1**

Sometimes, it is difficult to answer the questions by this means; some of them require more specificity, such as the ones about the work environment or the relationship with my co-workers. The lack of information and data show my ignorance about certain issues.

The initiative of evaluating the company is very interesting and necessary, in relation to the opportunity to obtain data, the information given to the manager about future decisions made and the part-taking of workers. Investigation on team work would be interesting.

One suggestion: To inform the staff about the optimization of CELEI as organization: its goals, priorities, organizational relations, future forecasts, commitments...with the aim of improving professionals awareness and motivate them for positive collaboration.

**Questionnaire #4**

I was hired by SIT Study Abroad, not CELEI, so there were issues not applicable to me.

**Questionnaire #5**

Now that we have one more opportunity, answering seems easier, however, there were statements where my answer could change depending on how I appreciated them. For instance, statement number 9: I think that CELEI, at the moment, is very well managed since it is being evaluated for improvements. Regarding statement number 16, I think that CELEI manages its technological resources effectively, given the extension of the company. Nevertheless, staff does not know how to use them effectively.

I agree with the rest of the statements from my point of view and taking into account the role I play in CELEI.
Questionnaire #6

CELEI is an organization that is starting to take its first steps. Apart from the already existing programs, the new projects and goals are still a mystery; therefore, I am not quite sure about where we will be in 5 years. Also, I do not know whether we will be able to compete in a more and more quality, price and good service demanding market. At this moment, CELEI is just what we had before but named differently.
We should think about what we want or what we would like to achieve, and most of all, if we are able to gain other clients different to World Learning/SIT, that is to say, if we will know how to sell a product without the external help we get from such a consolidated organization.
On the other hand, I think that communication channels between different management members and professors are not always effective. Many times, the same information was given to different members and finally got so confusing and distorted that it resulted in a lack of knowledge, misunderstandings or, simply, in going in circles to finally remaining the same or unsolved problem. Seriously, I think it is unbelievable that after three or four years, we are still discussing the role of everyone in cultural activity, language, or in the community project (a new term for us). It is good to change or innovate but not to drive the staff crazy going forwards and backwards with the same thing.
To conclude, I just want to mention that we need more support from the organization for staff training. Any school or program is concerned with staff retraining, facilitating them to attend conferences or seminars related to their educational profession.

Questionnaire #7

I think we need to invest in quality training for CELEI’s professionals, so that we keep a good position in a more and more demanding market and we feel loyal to this company, basing this loyalty on the belief that we work in the best place. We need to implement protocols that would allow us, without restraining our actions excessively, to work effectively and avoid improvisation (not creativity). A very significant example is what happened recently in our program regarding the community service. Communication channels seemed to have obstacles.

Questionnaire #8

I think professor training and updating is very convenient if it does not entail a change in financial decisions, whenever the training processes are financed by the organization.
Updating the audiovisual material and computers is essential too.
A. **PROCESS OBSERVER PROTOCOL**

Team Name: 
Date: 
Participants: 

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<th>PROCESS</th>
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<td>How did the meeting start?</td>
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<td>How was the time of the meeting distributed?</td>
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<td>Did the team explore all the issues in the agenda?</td>
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<td>How did the members get the information and explore points of view?</td>
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<td>How was consensus achieved at the meeting?</td>
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<td>How active and balanced was the participation?</td>
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<td>How was the mood of the meeting</td>
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<td>How did the meeting conclude?</td>
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<td>How did the members fit with the process?</td>
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<td>How did members develop their ideas?</td>
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B Team Minutes Format

Team name:
Date:
Participants

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<tr>
<th>ISSUE</th>
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Introduction
This exercise is a qualitative evaluation instrument. Its aim is to reflect as a group on the effects of cooperative self-evaluation in CELEI

Questions to answer (30 minutes each)

- What did CELEI self-evaluation mean for me?
- What effects did self evaluation have on the institution?
- What effects did self evaluation have on me as a member of the institution?

Format:

- Facilitator asks a question and allows for some minutes for personal reflection.
- Participants raise their hands to speak.
- We need to hold the recorder to start talking
- Interventions are limited to 2 minutes
- We always follow the facilitator’s directions
FORMACIÓN DE EQUIPO

Propósito:
Transmitir al grupo los conocimientos esenciales para trabajar en equipo de forma efectiva en el contexto de Evaluación del proyecto

Metas:
1. Familiarizar a los participantes con el trabajo en equipo
2. Utilizar el trabajo cooperativo para evaluar el proyecto

Objetivos
Esta sesión permitirá a los participantes:
1. Familiarizarse con los elementos básicos para el funcionamiento de equipos
2. Reconocer los principales roles de los miembros de un equipo y sus responsabilidades
3. Tomar conciencia de nuestro papel como miembro de un equipo y las responsabilidades que conlleva
4. Propiciar un ambiente positivo de aprendizaje cooperativo y trabajo en equipo
5. Transferir los elementos esenciales del trabajo en equipo a los grupos de trabajo del Proyecto de Atención a la Diversidad

Actividades
1. Explicar los roles de los miembros de un equipo: Facilitadora, Observadora del proceso, Secretaria, Experta.
2. Presentar los elementos básicos del trabajo en equipo:
   a. Reflexionar sobre las responsabilidades de los participantes
   b. Proponer y consensuar las reglas básicas de funcionamiento
   c. Analizar el papel del orden del día como instrumento de trabajo
3. Presentar los diferentes estadíos del proceso de formación de equipo y las dinámicas de grupo características en cada uno de ellos
4. Presentar el modelo de Aprendizaje por la experiencia
5. Identificar elementos concretos que deben transferirse a los grupos de trabajo
6. Reflexionar sobre cómo deben estos elementos insertarse en el modelo actual de trabajo en equipo

**Formación sobre Trabajo en Equipo**

El trabajo en equipo es una consecuencia lógica de un cambio en la estructura de autoridad en una institución. Al pasar de una estructura vertical a otra horizontal, todos los miembros de un equipo comparten responsabilidades y atribuciones en diferentes medidas. El modelo de trabajo en equipo requiere una modificación de los papeles tradicionales de los cargos directivos que deben ceder control aún reteniendo las parcelas de decisión que son específicas del cargo y de los trabajadores que tienen que asumir responsabilidades y tomar iniciativas pasando de una actitud pasiva a una implicación activa.

Un elemento esencial para que el modelo de trabajo en equipo sea operativo, es una estructura clara de trabajo, donde los objetivos, responsabilidades, tiempos y recursos necesarios para llevar a cabo una tarea determinada estén claramente especificados: “**Orden del día como instrumento estructurador del trabajo en equipo**”

**Responsabilidades de los diferentes roles**

**Responsabilidades de la Facilitadora**

- Elaborar el orden del día, iniciar la reunión y sugerir las pausas
- Animar a la comunicación e implicación de todos los miembros.
- Pedir resumen de las intervenciones y/o ejemplos para clarificar asuntos.
- Parafrasear una intervención para aclarar significados
- Explorar ideas con mayor profundidad y animar a nuevas ideas
- Parar la discusión para centrarse en el proceso y volver al tema en caso de dispersión
- Concienciar al equipo de los sentimientos de un miembro determinado
- Ayudar a exponer diferentes opiniones no expresadas
- Ayudar en la toma de decisiones

**Responsabilidades de la observadora**

- Observar y anotar el desarrollo de las sesiones
- Llamar la atención sobre conductas que afectan a la efectividad del equipo
- Observar e informar sobre el seguimiento de las reglas de trabajo en equipo
- Sacar a la luz conflictos y ayudar a solucionarlos
- Analizar el proceso de actuación del equipo de evaluación
- Apoyar a los demás miembros del equipo de evaluación
Responsabilidades del secretario

➢ Controlar los tiempos en las sesiones
➢ Distribuir las intervenciones
➢ Tomar nota de los temas relevantes
➢ Elaborar las actas
➢ Recopilar los documentos producidos durante las sesiones
➢ Apoyar a los demás miembros del equipo de evaluación

Responsabilidades de la experta

➢ Presentar los Objetivos de cada una de las sesiones
➢ Aportar las documentación necesaria para el desarrollo de las sesiones
➢ Comprobar el progreso del equipo
➢ Identificar causas y consecuencias de distintas acciones
➢ Facilitar el consenso del equipo
➢ Mediar en resolución de conflicto
➢ Hacer conclusiones finales

Responsabilidades de Participantes

➢ Informarse del orden del día
➢ Llegar a tiempo y preparado a las reuniones
➢ Participar activamente en las reuniones
➢ Contribuir al trabajo del equipo aceptando responsabilidades
➢ Aceptar los roles de facilitador, secretario y observador
## Conductas en el equipo que...

<table>
<thead>
<tr>
<th>Ayudan</th>
<th>Interfieren</th>
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<tbody>
<tr>
<td>Llegar a tiempo y preparado a las reuniones</td>
<td>Hacer crítica negativa</td>
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<tr>
<td>Mantener una comunicación abierta y honesta</td>
<td>Ser dominador, manipulador</td>
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<tr>
<td>Escuchar para entender, hablar para hacerse</td>
<td>Enmascarar aseveraciones en forma de p</td>
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<tr>
<td>Atenerse al orden del día</td>
<td>Saltar de un tema a otro</td>
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<tr>
<td>Elaborar sobre las ideas de los demás</td>
<td>Utilizar estereotipos. Tener prejuicios</td>
</tr>
<tr>
<td>Ser optimista y positivo sobre el equipo</td>
<td>Interpretar de forma selectiva</td>
</tr>
<tr>
<td>Criticar ideas, no personas</td>
<td>Atacar a las personas</td>
</tr>
<tr>
<td>Participar, ofrecerse voluntario.</td>
<td>Impedir la toma de decisiones con actitud sarcasmo</td>
</tr>
<tr>
<td>Ofrecer liderazgo cuando sea requerido</td>
<td>Buscar la aprobación de los demás</td>
</tr>
<tr>
<td>Realizar las tareas de seguimiento comprometidas</td>
<td>Expresar desánimo, resignación o falta de entusiasmo</td>
</tr>
<tr>
<td>Prestar atención, mantener una postura abierta</td>
<td>Practicar el aislamiento psicológico</td>
</tr>
<tr>
<td>Tomar los problemas con seriedad</td>
<td>No prestar atención, reflejar aburrimiento</td>
</tr>
<tr>
<td>Ser cortes, honesto y confiado y decir lo que se siente</td>
<td>No prestar atención, reflejar aburrimiento</td>
</tr>
<tr>
<td>Apoyar a los miembros del equipo</td>
<td>Estar de acuerdo con todo</td>
</tr>
<tr>
<td>Comprometerse en hacer que el equipo funcione</td>
<td>No comunicar, cooperar o participar</td>
</tr>
<tr>
<td>Mostrar sentido del humor</td>
<td>No escuchar, hacer conversaciones en co</td>
</tr>
<tr>
<td>Establecer unas metas y tiempos para alcanzar meta realistas</td>
<td>Juzgar personas o ideas</td>
</tr>
<tr>
<td>Establecer unos roles claramente definidos</td>
<td>Tener una actitud cerrada</td>
</tr>
<tr>
<td>Distribuir el trabajo de forma equitativa</td>
<td>No aceptar responsabilidades</td>
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Estadios del proceso de formación de un equipo

La formación de un equipo es un proceso largo y explícito, que requiere de una dedicación de tiempo y recursos que permitan a los miembros adquirir los conocimientos, habilidades y actitudes necesarios para funcionar en una estructura horizontal propia del trabajo cooperativo.

En el proceso de conformación de equipo se pasa por cuatro estadios:

- **Estadio de formación**: Los miembros en esta etapa están averiguando qué significa formar parte de un equipo y por qué están ahí.
- **Estadio de formación de grupo**: el equipo decide su dirección y control; sus objetivos, reglas y mecánica de funcionamiento.
- **Estadio de producción**: En el que el equipo empieza a actuar de forma cooperativa llevando a cabo los cometidos encomendados.
- **Estadio efectivo**: En el que el equipo ha realizado el periodo de ajuste y puede funcionar con plena efectividad.

Visto bajo el enfoque de dinámica de grupo, en inglés se habla de: “Forming, Storming, Conforming and performing”

**Condiciones clave para el éxito de un equipo**

- Que los miembros entiendan y compartan los objetivos del equipo
- Que los miembros estén dispuestos a cambiar el estilo de trabajo y tipo de responsabilidades
- Que la comunicación sea ágil, fluida y espontánea
- Que exista respeto, apertura de mente y espíritu de cooperación
- Que se mantenga un ambiente cómodo y de confianza
- Que el equipo preste atención al proceso para mejorar su capacidad de funcionamiento.
- Que el liderazgo rote y cada miembro llegue a dominar diferentes roles.
- Que cada miembro realice de forma efectiva sus responsabilidades

**Causas del fracaso de un equipo**

- Desajuste con la estructura jerárquica de la organización
Enfocarse demasiado en tareas de producción y descuidar la dinámica interna y de formación del equipo
- Falta de disciplina de los miembros para tomar responsabilidad de sus conductas y acciones
- Los miembros no reconocen y aceptan los patrones de los estadios del proceso de formación de un equipo.
- El equipo no tiene un liderazgo apropiado y/o tiene insuficiente formación
- La organización no aprovecha el esfuerzo del equipo de forma significativa.

Dinámica de grupo: Problemas de miedo y control

Durante el proceso de transformación de un grupo de gente en un equipo, la organización y los individuos dentro de ella se encuentran a diferentes miedos y temas de control. Con frecuencia se manifiestan en síntomas como: falta de participación, retención de información, falta de celo en realizar tareas asignadas, negativa a aceptar responsabilidades, temperamento alterado,... A nivel profundo, los miembros están luchando por cumplir las responsabilidades y expectativas de una nueva cultura en el trabajo.
La cultura tradicional hace asunciones sobre los trabajadores sobre la base del miedo: ....necesitan que se les diga lo que tienen que hacer, necesitan disciplina para seguir las reglas, están motivados por el dinero, son descuidados y olvidadizos, intercambiables y reemplazables,...
Una cultura de equipo, por el contrario, hace asunciones sobre los trabajadores sobre la base de la confianza: ....son honestos y merecen confianza, son un recurso valioso, están interesados en el propósito de su trabajo, están dispuestos a trabajar para conseguir objetivos, ...
En el proceso de cambio de una cultura tradicional a la nueva cultura de equipo los miembros experimentan lo que en inglés denominan “el estiércol in el medio” que se caracteriza por:

- Aprehensión y ansiedad
- Muchos intentos fallidos
- Exploración precavida de nuevos conceptos
- Esfuerzos por averiguar y evaluar lo que los demás están haciendo.
- Fuerte resistencia al cambio.
- Tensión, estrés y salidas de tono.
- La sensación de que todo se está saliendo fuera de control.

Estos sentimientos, no son buenos ni malos y tienen derecho a existir. Por otra parte, las emociones son la raíz de las motivaciones que provocan nuestras conductas y los sentimientos son la raíz de las emociones. Por tanto, es absolutamente necesario que el equipo preste atención a estos procesos.
Debe potenciar la expresión de sentimientos, reconocer su legitimidad y ayudar a canalizarlos de forma constructiva.
Los miedos pueden manifestarse en muchos campos: miedo a lo desconocido, a la responsabilidad, a no ser capaz, a la pérdida de control, al rechazo, al cambio. Para los “jefes” los miedos más significativos son el delegar control, y el de responsabilidad por la formación del equipo.
El antídoto del miedo es la confianza y el éxito de un equipo requiere la creación de una atmósfera de confianza donde los miedos se procesen de forma positiva dentro de una dinámica de cambio cooperativo.
Nuestro nivel de confianza en un equipo se basa en nuestra percepción de un equilibrio entre lo que estamos poniendo y lo que estamos recibiendo del mismo.
Que es la confianza? Douglas McGregor define confianza como “la certeza de que el otro no va a aprovecharse de mí, de forma accidental o deliberada, consciente o inconscientemente. Que yo puedo poner mi trabajo, mi estatus y mi autoestima en manos del otro con completa tranquilidad”

**Sistema de compensación del trabajo en equipo**

**Criterios que se deben establecer:**
- Quién debe de recibir compensación
- Qué y cuanto supone una compensación adecuada
- Formas que puede tomar una compensación.
- Cuáles son las alternativas viables dadas las posibilidades de la organización
- Parámetros para valorar el trabajo desarrollado (producto y dificultad)

La forma de calculo de honorarios por el trabajo en equipo, debe de considerarlos siguientes factores

- Recuento de horas que hemos empleado en reuniones
- Tiempo empleado en trabajo fuera de las reuniones
- Estimación del trabajo real que hemos desarrollado
- Peso de la formación en el proceso de formación de equipo
- El sistema diseñado tiene que ser aplicable para los diferentes equipos de trabajo
This report is for CELEI’s staff members and is intended to be a means of organizational development. It includes the CELEI assessment and the recommendations the evaluation team made in order to improve the current situation of the organization and to consolidate CELEI as a highly specialized company, which is feasible and offers quality programs. The assessment and recommendations are based on data related to four different evaluation areas: equipment, human resources, internal operation and sustainability. For these, we have developed concepts and specific indicators, including reflective exercises and group dialogues, questionnaires, observation and documents analysis. Processing and interpreting data were cooperative exercises. The evaluation report and recommendations are presented in a document that reflects different staff sensibilities.

CELEI’S ASSESSMENT

Equipment


CELEI has a “charming location”, which has some advantages and disadvantages: a positive aspect is being located next to a viewpoint inside a historic quarter of a worldwide famous city, which is an incentive for all our clients and workers. Although access to this quarter by a private car is quite limited and causes some problems, minibus service is quite good. The physical location is such a privilege since it is a garden house. However, it has a problematic distribution of space for meeting the needs of an educational organization. An effort to optimize all the spaces is necessary to keep it functional and welcoming. Taking the limitations into account is essential in order to host a greater number of participants and also consider alternative spaces outside the center when necessary.
Furniture and technological equipment of CELEI have been purchased in different phases, for meeting the needs of particular circumstances; therefore they are not homogeneous and only partly functional. However, they were set up with imagination and originality. It is important to fix shortcomings that we still have and to continue with the improvement and conservation effort. Staff training in technological material use is especially required in order to achieve satisfactory use and conservation levels. Conservation of this centre is appropriate although its functions are not well framed in the CELEI’s scheme. CELEI fulfils all legal requirements that allow the development of its educational roles; however it should obtain quality certificates and join organizations of this field that consolidate its prestige.

Human Resources

Staff Remuneration. Multi-functionality of the work positions. CELEI staff’s awareness of the programs. Expectations of the organization members. Training needs. Legal aspects.

After assessing the needs of CELEI’s staff for carrying out their job, we may say that different positions described in the scheme are carried out partially by the staff. Furthermore, these positions are not comprehensively developed and described since some integration and organizational development functions are missing. Workers are not trained well enough to take new responsibilities. The development of new skills by all CELEI workers is a priority so that they can work in a multifunctional way. A part of this training should apply to awareness of our programs; since each subgroup is aware of its area, but does not have enough information about the other areas or that information is not operative within the organization. CELEI members’ expectations are very different, that is why each one needs to have comprehensive knowledge of the organization, to become aware of the position he/she should take according to CELEI’s needs and his/her professional interests. He/she also should be aware of the responsibilities that position entails. Staff training needs are significant in order to settle the new CELEI’s structure and to create multifunctional and team working skills. Staff training as such should be included in the regulations of CELEI’s internal operation and in the description of the work positions.

There is a situation of uncertainty and dissatisfaction about work and legal issues among CELEI’s professors. The same applies to the new dynamics and challenges CELEI’s management wants to carry out and transmit to CELEI’s employees. Nonetheless, the involvement or commitment level they are willing to get, according to the new company guidelines, is not clear enough. It is necessary to search CELEI’s reference legal framework and to describe the work positions and the remuneration means appropriately. CELEI also needs to identify the profile its professionals should have: academic training, professional experience, dedication level, flexibility, etc.
Internal operations

CELEI’s internal organization. Team work. Protocols/procedures. Evaluation systems. 
Documentation and accessibility. Group dynamics and staff members communication.

CELEI’s internal operation has been shaped considering the principal elements of the programs it offers; sections (homestays, language, summer programs, themes, communities…) and professional tasks are not clearly defined. The temporary nature of our programs makes the work relation be discontinuous and the professional implication insufficient to consolidate the organization’s internal operation. Team work has been an integral part of CELEI’s programs; however, it has had little formal organization and has been quite dysfunctional. The team work model is not settled in the organization. CELEI started to create work teams in January 2007 for developing projects and attending to team formation.

CELEI has been creating protocols since its foundation in 2005. These protocols apply to summer and language programs. They are in an implementation phase and have not been completely internalized by the staff members. The process should continue towards the creation of some internal regulations of the organization that includes these protocols.

CELEI has a documentary asset which has great academic and management value. It makes CELEI function as a specialized, international education company, specialized in “experience-based learning”, interculturality and interdisciplinarity. The internal evaluation process has surfaced these resources as a part of data generation during evaluation. Documentation is very diverse and specialized in different issues. It is necessary to create a centralized information system to make it more accessible, optimize programs and contribute to staff training. That system has to be respectful when using this information considering the “private domain”.

CELEI has a very developed evaluation system for its programs and components. Yet, there is a lack of organizational evaluation and higher systematization for applying the recommendations of the evaluations.

Our group dynamics reflect a change period that CELEI is living since its legal foundation in 2005. The slow creation of the new structure makes the staff feel insecure and uncomfortable in their position and question the new situation. What is more, CELEI faces a very dysfunctional communication system and some tough and difficult issues on personal relations grounds. The insertion of SIT programs in CELEI entails a complex and unusual system of responsibilities, unequal work positions and a temporization difficult to manage. Working for communication and conflict resolution is a priority in CELEI as an essential part of CELEI’s internal operation.

Sustainability

CELEI’s identity has been built over these years on the basis of the programs that have been progressively offered and its legal impulses that were adapted to the structure of the programs it had in each moment. No team member joined a company with a legal identity and a shaped image. The creation of CELEI’s web page and report, where its activities and pedagogical approach were defined, has been a cooperative process of building the organization identity. Self-evaluation has resulted in reflection and sharing time about different personal views about CELEI. It is significant to study in depth its identity, in order to align perception and mission in a productive way.

CELEI has only one supplier, which makes it hardly feasible with its current format. Despite this weak situation, its position to keep that supplier is strong and its credentials for introducing into a specialized market are good. Obtaining one or two university semester programs would consolidate the organization during the academic year period and the languages department as the most important specialization of CELEI. According to the management team view, the area of “training trainers” may bring a national market development that will be a significant contribution of the organization to society and internal staff. However, the development of this area requires the staff training for playing new roles. The introduction of internships may be a good method for settling a sustainable system of qualification and thus having expert staff to carry out projects within the organization field.

CELEI is not intended for individual students but for educative and civil organizations. This feature makes it an educative organization different from schools and educative centers which have a direct access to customers.

Marketing field is poorly developed in CELEI. A web page and a professional report, the development of advertising material for a new program and its introduction in the market are the results of the efforts we have been making until today. Work in this field is done spontaneously and responds to temporary needs not very effectively. It is necessary to work for a marketing strategy as a part of the programs development and also a general plan for a market introduction; our webpage has to be more present on the internet.

CELEI is financed, since its foundation in 2005, with the income from the programs and the contribution of company partners. Investments have been covered by contribution of company partners and the operation costs are covered by the incomes from services, but in a precarious way. An increased activity is essential for making the company sustainable.

CELEI does not have a financing plan that foresees different sources of income, expenses items and specifies budget and control mechanisms. It has a consolidated fiscal and labor management; nevertheless, there are still problems and imbalance of the hiring models.

CELEI is an organization that has collaborations as an essential part of its programs design: families, local coordinators, organizations, professors, instructors, project manager, etc. This wide range of collaborators, which is a valuable resource of CELEI, is also a source of weakness and complexity for its management. This needs to be taken into consideration when considering its scheme design and the organization internal regulations. What is more, CELEI has little collaboration from organizations in the educational field, partly because it is very new. We need a plan for introducing the
organization, searching significant collaborations and participating in specialized forums for making
the organization be more known. Furthermore, we will need to learn how capitalize on the existence
of Enlaces-Links, a forum that promotes intercultural education.
The evaluation efforts should be joined in a strategic plan that consolidates the organization.

RECOMMENDATIONS

The following recommendations are intended to respond appropriately to apparent needs in every
comprehensively evaluated field. For each recommendation, we have taken into account CELEI’s
background, logistics and limitations. Likewise, recommendations reflect values, beliefs and
assumptions of the evaluation team and different feelings as well.

Equipment

Short term: (Priorities)
1) To designate a person in charge of center maintenance and/or a protocol to follow when
something does not work. After having that done, the following should be considered:
   A) To comprehensively check the facilities regularly in order to maintain it in good
      conditions: sockets, paint, baseboards, windows, doors, blinds, chairs, blackboards,
      toilets, furniture, etc.
   B) Placement of the cork boards in the classrooms.
   C) Curtains for a better use of the Generalife classroom
   D) Television tables: fix the bases and add them wheels for a safer use
   E) Chairs for the garden table (more comfortable and homogeneous)

2) To make CELEI’s staff familiar with the existing equipment operation (telephones, faxes,
printers, projector, photocopier, DVD player and video), computers (ADSL), software (Power
Point), both for programs preparation and improving the use of the equipment and materials.
3) To create a filing system for all documents (created during CELEI’s evaluation process) and
   also a physical place for them.
   To make the staff familiar with this system as a resource for accessing files and existing
documents until now.

Medium-term:
1) Centralization, both digital and hard copy, of files and documents (Programs, CELEI and
   Enlaces-Links)
2) Library centralization and cataloguing
A) To make the library materials more visible to students, inform about WL/SIT on-line library access and about the current checking system for both the staff and the students.

3) Obtaining quality certifications of our centre, joining other organizations and improving our information on the internet (Google, Yahoo, etc)

**Long-term:**
1) Getting new furniture to improve the center image and make it homogeneous.
2) A better preparation of the Hamman classroom (Replacement of the carpet with more useful material), centralization of the audio-visual materials (DVDs and videos) and library mobilization (better accessibility) as well as an improvement of the pedagogical and informative material for professors and students.
3) Getting new computer equipment (computers and printers) both for the professors and students or set a network printer.

**Human Resources**

Staff Remuneration. Multi-functionality of the work positions. CELEI staff’s awareness of the programs. Expectations of the organization members. Training needs. Legal aspects.

**Short term: (Priorities)**
1) To evaluate CELEI’s immediate personnel needs considering the possible incorporation of new employees. This is a priority to ensure sustainability. Specialized staff, at least one person that assists CELEI’s management, is essential in order to make priority projects take off.
2) To define multi-functionality of the work positions, clearing up what the organization leadership asks the employees and what the employees can actually do or are willing to do. Considering this, to offer more stability and continuity to the work positions, taking advantage of the employees that may respond better to the organization needs. For getting this, it is necessary to improve the staff preparation for them to develop other functions different from those they were hired for, if they wish.
3) Urgent employment contract revision and description of functions, according to CELEI’s needs. This process should lead to the optimization of CELEI’s Scheme.
4) To make clearer the achievement of the three previous points with the aim of create a trusting atmosphere among all CELEI staff members, joining forces for the achievement of a common project.
Medium-term:
1) Considering the nature of our center and, indeed, of the majority of our clients, it is important for our staff to acquire a cultural and linguistic competence in English so that they are functional in that language. Given the current sustainability of this center, it cannot offer financing or grants for the staff at the moment. However, we should profit from the “exchange” system we promote among our students.
2) Consolidation of the principle of “extra” work (seminars, presentations, workshops…) as an opportunity for “professional training” and beneficial not only for the centre but also for the staff members.
3) Training for professional development using possible external resources.

Internal Operations

CELEI’s internal organization. Team work. Protocols and procedures. Evaluation systems. Documentation and accessibility. Group dynamics and staff members communication.

Short term: (Priorities)
1) Creation of an internal operation framework in agreement with the current needs of CELEI, defining the necessary divisions clearly and specifying the functions that need to be covered in order to initiate the priority programs and projects.
2) Creation of CELEI’s general file and database that can be accessible for the staff. This includes all the registers created during CELEI’s evaluation and specific information about programs and their elements. This entails assigning the persons in charge and defining the format and assigning physical location.
3) Description of work positions and employment contracts that clearly reflect: competences, responsibilities, remunerations and team working format for CELEI’s staff.
4) Giving specific information about the internal operation of SIT programs to the rest of the staff for a better knowledge of the programs and understanding of the academic directors’ responsibilities towards SIT and CELEI. Developing a protocol that improves communication between academic directors, coordinators and professors in relation to changes, workload for students, evaluation means, complains, problems, etc.

Medium-term:
1) To continue improving the use of the format already established for evaluations and comments for an improvement of the existing programs, with the contribution of the staff members and collaborators who wish, including the evaluations required by our clients.
2) To continue promoting team work, not only for a better operation of different areas already developed, but also as a tool to improve communication and assumption of responsibilities. To promote team work effective and functionally so that we can avoid an excessive number of meetings for achieving our goals.
3) To design a conflict resolution protocol considering possible scenarios and parts involved.
4) To design a more flexible and broader timetable reflecting the availability of the center and secretary for the students of the existing programs and to make this information visible to them.

5) To create a tutoring system for students, according to needs and requirements of our clients.

Long-term

1) To establish an organizational evaluation system including all CELEI’s staff.
2) To request, when necessary, an external mediator in case of a serious conflict, related to CELEI’s staff or the representatives of our current clients.
3) To promote flexibility of CELEI’s internal operation in order to make it respond appropriately to the programs needs and take into account the students profile.

Sustainability


Short term: (Priorities):

1) To identify actual needs of the staff, communities, professors, physical space, etc. for the summer programs, which are currently priorities.
2) To make sure that CELEI can provide for all needs the new SIT program will have: professors, staff, physical space, collaborations, etc., using the new program model.
3) To identify and get marketing services to carry out the required promotion of the programs and projects, using the material we have developed until now for these purposes. (WEB, Google, Yahoo, and other communication/promotion channels).
4) To search external collaborations that increase sustainability of the institution and, at the same time, seem attractive to our clients, such as the University of Granada.

Medium-term:

1) To continue working on the development of CELEI’s “educative projects”, mainly university programs, in order to assure CELEI’s sustainability, taking full advantage of external collaborations.
2) To increase advertising in specific universities using all existing contacts, presenting our programs in conferences and specialized forums.
3) To obtain quality certificates in Education: Instituto Cervantes, among others. To become partners with other organizations with similar projects (intercultural education), similar
location (Asociación andaluza de escuelas), similar programs content (NGOs, Support Centers), etc.

4) To promote marketing (Market introduction strategic plan).

**Long term:**

1) To consider other kinds of educative programs for University and High School students as a source of work and incomes for CELEI.
2) To search for organizations, institutions and associations that may be interested in our programs and courses.
3) To create CELEI’s brochure including the organization profile, our programs, target beneficiaries, dates, etc.
4) To make CELEI recognizable in the field of intercultural education by means of advertising, other organizations contacts, invitations to get to know us, conferences attendance, etc.
5) To increase our contacts in the field of intercultural education by means of Enlaces-links.
6) To think about the possibility of renting our center or classrooms to any organization that may need it during CELEI’s non teaching periods, as well as to look for a physical space that may be used if needed.
**FINAL CONSIDERATIONS**

CELEI’s evaluation process coincides with an especially difficult period for the organization, due to the loss of one of the SIT study abroad programs, which increased the weakness of the organization in maintaining work positions and self-financing in a sustainable way. This situation has forced CELEI to make a great effort to develop projects that widen its field of activity and increase its client portfolio.

The work overload on usual functions and responsibilities of CELEI’s staff, caused by the development of new projects and the evaluation as well as the introduction of a team work system (Spring 2007), has resulted in staff dissatisfaction and doubt. This affects the organization group dynamics very negatively.

The evaluative team recommends a reflection period where the current rhythm for organization and programs development is significantly reduced, in order to reinforce our achievements and give some time and space to the members for reconsidering their positions and level of involvement in CELEI.

Furthermore, CELEI’s leadership should make an effort to keep the organization’s feasibility. These conditions entail cost-containment feasible with our current incomes, meeting the developed programs needs accordingly and making progress, though slower, in the development of new projects and the undertaken organizational consolidation.

Within this framework, the leadership is committed to create a plan for the implementation of the recommendations made in the evaluation in order to assure that all necessary actions are taken.

**Director/ Expert personal statement**

In the dual role a director of CELEI and evaluation expert, I consider the process of cooperative evaluation has given shape as an entity independent of the people conforming it. The evaluation reveals it to be weak in its internal structure and staffing, but also to be an organization capable of learning through ongoing projects. An organization that learns is one whose’ members are open to learning and has a structure that facilitates and consolidates learning. This is an important lesson each of us needs to internalize as personal learning.

The present dual role (director/expert) that I have undertaken during the evaluation process will become that of director/trainer during the implementation phase. This will ensure that learning will become an integral part of CELEI operations.

In Granada, May, 13th, 2007
Appendix J  Project-based Teams

EVALUATION TEAM

Distribution of roles:
Facilitator: Cristina Enríquez
Recorder: Juanfe Santos
Observer: Marisa Hernández
Expert: Antonia Bolívar

Team purposes:
Learning about team-work and cooperative evaluation
Carrying out the process of internal evaluation within a cooperative learning framework
Following up on the implementation phase.

Team starting date: 17/10/2006

LANGUAGE TEAM

Distribution of roles:
Facilitator: Juanfe Santos
Recorder: Fabiola Labella
Observer: Odette Rodríguez
Experts: Antonio Magaña/Antonia Bolívar
Team members: Cristina Enríquez, Julia Salazar

Team purposes:
Coordinating language component implementation and articulating SIT program operation within CELEI.
Designing the language component of the new CELEI programs.

Team starting date: 19/12/2006

SUMMER PROGRAM DESIGN TEAM:
Distribution of roles:
Facilitator: Antonio Magaña
Recorder: Juanfe Santos
Observer: Odette Rodriguez
Experts: Antonia Bolívar
Team members: Belén Pérez

Team purposes:
Designing the summer program for Spaniards and adapting the WL programs to a new structure for summer programs
Initiating a cooperative learning and team working process

Team starting date: 16/01/2007
Team closing date: 18/5/2007

University Programs Team:

Distribution of roles:
Facilitator: Marisa Hernández
Recorder: Fabiola Labella
Observer: Cristina Enríquez
Expert: Antonia Bolívar

Team purposes:
Initiating a cooperative learning and team working process
Studying existing designs of university programs that may enrich our projects
Developing CELEI’s projects in the “Study Abroad” field

Team starting date: 10/01/2007

Laurel de la Reina High School Intervention Team:

Distribution of roles:
Facilitator: Maria Isabel Moreno
Recorder: Sole Leyva
Observer: Lola Polo
Expert: Antonia Bolívar
Team member: Mariela Tapia
Team purposes:
Carrying out the process of internal evaluation within a cooperative learning framework
Elaborating an evaluation report that facilitates the implementation of recommendations in the school context.
Learning about teamwork

Team starting date: 22/02/2007
Team closing date: 15/6/2007

WL Summer Programs Team:

Distribution of roles:
Facilitator, Expert: Antonia Bolívar
Recorder: Laura Polo
Observer: Belén Pérez
Team members: Antonio Magaña, Cristina Enríquez

Team purposes:
Carry out responsibilities for summer programs implementation
Initiating a cooperative learning and team working process

Team starting date: 23/05/2007
Appendix K  Summer Program Project

PROGRAMA DE INMERSION LINGUISTICO/ CULTURAL PARA ESTUDIANTES DE SECUNDARIA

Con la intención de contribuir a la Educación Intercultural de nuestros jóvenes para ayudarles a ser más competentes en la sociedad actual y, atendiendo las peticiones de muchas de nuestras familias, estamos diseñando un programa intercultural de cara al próximo verano para jóvenes entre 14 y 17 años.

El programa consiste en un campamento de inmersión en Inglés con 40 horas lectivas y 13 días de duración ofrecido en Granada. Durante este tiempo, los participantes reciben un curso intensivo de Inglés y conviven en la residencia del Ave María con un grupo de estudiantes de habla inglesa. Las actividades incluyen sesiones interculturales, visitas educativas y oportunidades de deporte y diversión.

Formato
Después del periodo de campamento el programa ofrece tres posibilidades:
   A. Estancia familiar en Irlanda o el Reino Unido (Dos semanas)
   B. Recibir un estudiante americano en la familia (13 días)
   C. Finalizar el programa con dos días de clausura en la montaña.

Los objetivos de este Programa son los siguientes:

- Crear un espacio bicultural y bilingüe donde los estudiantes aprendan a convivir y compartir experiencias
- Mejorar la habilidad lingüística de los participantes a través del trabajo intensivo en el idioma y la práctica diaria con los compañeros de intercambio.
- Potenciar la competencia intercultural por medio de la reflexión durante el seminario lingüístico y de la inmersión en la comunidad con la estancia familiar.
- Crear un ambiente de aprendizaje cooperativo y lúdico acorde con los intereses e inquietudes de la edad.

La metodología se basa en el enfoque del “Aprendizaje por la Experiencia” utilizando el método comunicativo y usando siempre la lengua objeto de estudio de forma vehicular. Los alumnos se convierten en el centro del proceso y el contexto específico en la base para construir las experiencias comunicativas. Se trabajan las cuatro habilidades lingüísticas de
forma individual y en grupo tanto dentro como fuera del aula.
La implicación del estudiante en todo momento se formaliza por medio de un “contrato de aprendizaje” diseñado para fomentar la sensibilización con la lengua y cultura y el mejor aprovechamiento de la experiencia. Los alumnos se comprometen a utilizar la lengua extranjera y a participar activamente en la dinámica del programa de intercambio.

**Duración**
El programa tiene una duración de 30 días y se desarrolla a lo largo del mes de julio.

**Coste**
A: 2.450 Euros  
B: 940 Euros  
C: 1.285 Euros  

Para más información: Callejón de S. Cecilio, 13 18010 Granada Tl. 958-295954 Fax 958-272546 Email info@celei.org. www.celei.org
This is an interdisciplinary program that explores challenges and opportunities of human migration. It will present students with a wide range of topics, including the cultural, demographic, economic, and political impacts of immigration from the Spanish and European Union perspectives. It also studies laws and government policies for controlling immigration flow and the consequences of such laws and policies. Ethnicity, gender issues, education, and transnational dimensions of immigration along with social integration of various immigrant groups will be analyzed. The program offers four courses related to the theme program, a language course, and a study tour to places that are interesting within an integration or migratory context.

**PROGRAM COMPONENTS:**

**Program Orientation**

**Homestay**

**Intensive Language Study**  
90 hours/ 6 Credits  
Language Proficiency Pre-requisite: 4 College Semesters.

**Immigration Seminar**  
60 horas/ 4 credits  
1) *Spanish Society and Social Changes:*  
   - Personal communication, interaction rituals, social rules and identities.
- Politics, economics, race, religion, education and family
- Modern Spanish system and its repercussions.

2) Migrants, Minorities & Multiculturalism in Spain
   Spain Case: Emigration to Immigration
   A historical, political and economic perspective of this phenomenon.
   Proportions, implications and causes of human migration in Spain and receiving countries.

3) European Union and Spanish Immigration Politics
   Introduction to international agreements in regard to immigrant groups in Spain and the European Union. Spanish Immigration Law.
   Political, economic and social repercussions.

4) Immigration: Problems, Support and Integration.
   Education, gender, labor, linguistics, illegal human traffic, racial problems. Immigrant support organizations and government agencies.

Study Tours and Field Research: 4 credits
- Addressing issues of nationality, ethnicity, migration, integration and multiculturalism through visits to immigrant organizations, interviews with minority/immigrant representatives, and visits to places associated with the program theme.
- Sample tours: Greenhouse Agricultural Settling in Almería y Granada Coast, Border Line of Algeciras, Ceuta & Tangier, Madrid and/or Barcelona.
- Goals, methods, and current issues of research
- Development and presentation of a written and oral report of research.

Program Evaluation 1 Day Retreat

Note: Professors, lectures, institutions, and bibliographical resources developed, not included
CURSO DE ESTRATEGIAS DE TRABAJO COOPERATIVO Y EVALUACIÓN DEL PROYECTO DE ATENCIÓN A LA DIVERSIDAD E INCLUSIÓN DE ALUMNADO CON SÍNDROME DE DOWN DEL INSTITUTO DE ENSEÑANZA SECUNDARIA LAUREL DE LA REINA

FACILITADORA: ANTONIA BOLÍVAR
DISEÑO DEL CURSO

PROPÓSITO:

Aprender a trabajar de forma cooperativa, evaluando el Proyecto Atención a la Diversidad e inclusión de alumnado con Síndrome de Down del IES Laurel de la Reina, explorando las líneas de avance de dicho proyecto como parte integral del Proyecto de Centro.

METAS:

A. Familiarizarse con los principios del trabajo en equipo.
B. Examinar los puntos fuertes y débiles del Proyecto.
C. Explorar vías para trasladar dicho proyecto a la programación del aula

OBJETIVOS:

A través del seminario los participantes deben ser capaces de:

1. Obtener una visión común del significado del proyecto a nivel individual y para el Centro.
2. Familiarizarse con los conceptos básicos del funcionamiento de los equipos de trabajo y los diferentes roles asumidos por cada componente.
3. Funcionar como equipo en el desarrollo de tareas específicas durante el curso.
4. Identificar los componentes básicos del aprendizaje por la experiencia, aplicados al trabajo cooperativo
5. Identificar los puntos débiles y fuertes del proyecto en el aprendizaje del alumnado.
6. Considerar las implicaciones de la inclusión del proyecto en el aula respecto al profesorado, metodología y necesidades de formación
7. Sentar bases para adecuar las programaciones didácticas al Proyecto de Centro.
Estrategias de aprendizaje cooperativo
Proyecto de atención a la diversidad
12-14-19-21 Marzo, 2007

Horario de sesiones

12/III
17:00-17:20 Bienvenida y presentaciones
17:20-17:45 Presentación de PMOs, horario y Reglas del Diálogo de Grupo (Roles)
17:45-18:00 Descanso
18:00-20:00 ¿Qué significa para mí el Proyecto?

14/III
17:00-18:00 Formación de Equipo
18:00-18:15 Descanso
18:15-20:00 Puntos fuertes y débiles del Proyecto

19/II
17:00-18:00 Formación de Equipo
18:00-18:15 Descanso
18:15-20:00 Soñando el futuro.

22/III
17:00-18:15 Presentación “Soñando el futuro”
18:15-18:30 Descanso
18:30-19:45 Cerrando “la brecha”.
19:45-20:00 Cierre.
PROPÓSITO DE LA EVALUACIÓN:
Tomar conciencia del Proyecto de Atención a la Diversidad, cuál es su situación actual y hacia dónde queremos ir, con él, en el futuro.

INTERESADOS:
* Equipo de evaluación
* Profesorado del IES LR
* Alumnado
* CEP
* Delegación de Educación
* Instituciones locales
* Participantes en el curso
* Dirección del IES LR
* Asociación de padres y madres
* Asociación Granadown
* Universidad

ÁREAS QUE QUEREMOS EVALUAR:
Recursos pedagógicos
Recursos humanos
Organización escolar
Alumnado

INSTRUMENTOS:
_Diálogo de grupo:_ ¿Qué significa para mí el Proyecto de Atención a la Diversidad?

_Ejercicio de análisis del proyecto:_ ¿Qué es el Proyecto de Atención a la Diversidad?: puntos fuertes y débiles

_Ejercicio para crear una visión sobre el proyecto:_ “Soñando el futuro”

_Ejercicio para materializar la visión del proyecto:_ “Empezando a cerrar la brecha”
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<th>Fechas</th>
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<td>12/14-19/21- III</td>
<td>5-8</td>
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<tr>
<td>Elaboración de Informe y recomendaciones:</td>
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MATERIALES:
Carpetas, documentación, ordenadores, impresora, cañón y cámara de vídeo,
cámara de fotos, reproductor de CD, papel continuo, tarjetas, cartulinas, y folios,
rotuladores, ceras, tijeras, cinta adhesiva.

LUGAR DE REALIZACIÓN:
Biblioteca del Centro
Appendix N  Group Interview Transcription

- What has CELEI’s self-evaluation meant to me?

- (N. 9) To me, CELEI’s evaluation period was a challenging and learning stage. The challenge was being able to work against the clock and with a work load I never thought I could face: first of all, in a recovery period and then, assuming many roles at the same time. Personally, it helped me a little bit to control my impatience and intolerance; although I have much to learn in this area. Regarding professional learning, self-evaluation has been an opportunity to be a part of an important project where strengths and weaknesses were discussed, not only the ones of CELEI but ours too, including me, of course; improvement being always our main goal. Furthermore, it has been an opportunity to learn about team work, not as a sort of “friendship”, the way we conceived it before the evaluation, but a structured and democratic condition. This formula enabled us to make suggestions and plans, but mostly, it let us fulfill predetermined functions effectively. It has been an opportunity to take responsibilities, but also to delegate them and recognize certain tasks undertaken (or not) by other members. Moreover, this self-evaluation period has been a great opportunity to focus on administrative organization, which I had been postponing for some time. Finally, I had an opportunity to join together all the extremely valuable material the center has.

- (N. 7) I think the most important thing for me is that it put us in situations we had never imagined. With regards to this topic of surfacing information, I mean, I agree with N. 9 about having learned very much about the institution and some information we had out of reach. Well, I think it has been positive experience, but also a bit hard since we had to adjust to time. Moreover, by doing self-evaluation we get some information about things we do not like so much, which is important to understand.

- (N. 3) Well, this has been very useful to me in one way, I had an incomplete idea of what this was, partly because I have worked less than you all here; although I have been present, I am not the one who has worked the most here. I have been in and out and have taken care of small areas I was appointed to. I was not a part of the evaluation team but it was really positive
because with all the information I have managed and read, and the operation I have seen, I now have a complete idea of the institution although it is small, complex. Besides, it helped me a lot, or even forced me to work in a team, because I am a very autonomous person and making adjustments helped me a lot in working as a team.

- (N. 2) To me, CELEI’s self-evaluation has meant being able to reach information – information about the complexity of this center and CELEI as a service provider for SIT study abroad. It has helped me see that CELEI has a commitment to improve itself and shows reliability and capacity to provide services for an institution such as SIT. This is what we are looking for.

- (N. 8) I may say that mostly it has been a new discovery for me, seeing that we can join all the pieces I knew existed. By joining them all we can get a different thing. To me, it means that CELEI is taking shape in front of me and is doing it in accordance with our design. Actually, I think the evaluation process is similar to the pottery process, we take the materials and we make the amphora. Personally, as CELEI’s manager, it has made me become aware once again of what I was before, simply the subscriber of the company registration, simply because someone had to be the manager. I told some of you, or at least, myself that I came in the Hotel del Duque as Antonia and I got out not only as a manager, but as CELEI’s leader. This change has been very significant to me. It does not mean that I got out as an already-made leader, but as a person aware of my role in the company and its implications and myself being the person who plays this role. Being an evaluator has been a great way of learning to take small steps ahead of you and a very satisfactory experience regarding team work. The truth is that having worked with a team fulfilling all the requirements and following the rules of a textbook (we did not have other resources), and having succeeded has been a beautiful experience. It also entailed a lot of tension, effort and learning.

- **What are the effects of the self-evaluation on the institution?**

- (N. 7) I think that the most important effect on CELEI is having made a reflection, which I think was necessary and very important. It has acknowledged a SWOT – strengths, weaknesses, opportunities and threats. For me the self-criticism was essential because sometimes we are not aware of problems or issues, but this way, we will be able to carry out all change processes and transform.
- (N. 1) I think that team work is the real starter of the new direction of the institution, especially the evaluation team, I mean, the origin of team work is the actual evaluation team. It helped us know our shortcomings, needs, problems between different members, and our preparation, along with very useful documentation to identify all recommendations and to know if finally they are going to materialize.

- (N. 9) I would like to add to comments # 7 and # 1 that it helps us to know the work that needs to be done, however, talking about the effects until now I may say that the increase of organization since the beginning of the evaluation, 8 months ago, is amazing. It seems absurd but it may be noticed on simple things such as putting a book in the right place, or some things like that. I think all of us have realized that this lack of organization needed to be ended. Also, we needed to put our thoughts in a way or another, I mean restructuring, right?

- (# 3) To me, it seems very interesting for taking steps forward. There was a great amount of actions, elements, information that we were working on for a long time. From the beginning of the evaluation process, the institution started to find itself, to get organized to take steps. Some people talked about putting a book in the right place, or, for example, fixing a blind…well, this is possible thanks to an evaluation and organization process. Well, to me it is positive.

- (# 8) The most significant effect is the generating effect, as such. I mean generating information, knowledge, structure, attitudes, reflection…Therefore, the process has become a mechanism of creation and generation in many directions. This is the effect I would like to highlight the most.

- (# 6) I reaffirm what # 7 and # 1 said, that is saying that self-criticism is very important. Also, I hope that needs and policies of this centre can be analyzed in order to improve its operation.

- (# 1) what I am about to say may seem obvious but it is necessary to mention because I have been working on this. I think I am learning to manage a role, now, the secretary role. When you start managing a role, you can be prepared for managing new roles that you know much less about, I mean, the basis of team work is to know how to work in different areas. We have reinforced the
roles each one had, such as observation, secretary, etc., and we did not change
them until they were well settled. This made possible the development of
new roles that had not been settled yet. Well, it is a matter of learning.

- (# 8) To me, the effect the evaluation had on team work is very significant.
Actually, we need to admit that the concept of team work has been
introduced in CELEI thanks to the evaluation. It may be more or less
developed but we are still in the evaluation process. Besides, the fact that we
tried to conceptualize this institution, define it and its goals as a team is very
important, since before this process, we worked for something that had never
been an institution and had never had a mission and a view. Consequently,
the evaluation has turned this into an institution, with a view and a mission
and established work guidelines to develop its mission, although it is
important to point out that it is only a start.

- What effects has it had on me as a member of the institution?

- (# 3) I think that the most useful thing for me, considering my experiences
and mistakes, is thinking about what I can do and what I am good at and also
about my gaps and things I am not so good at. This encourages me to correct
those big gaps and to optimize the possibilities I have for those things I am
best at.

- (# 2) To me, it has meant a tension release. Now I could explain clearly and
openly my role of academic director and how responsible I feel for this group
of people working as a team. Personally, it has been good for me to give what
I can give and for all the people to know my role and my cooperative mission.

- (# 1) To me, it has been useful to learn how to work in a team and, as I already
said, becoming aware of my strengths and weaknesses. I also wanted to
emphasize difficulties (beneficial, in my opinion) we had working in a team
for designing criteria and showing different feelings; I have assumed a team
member role knowing the guidelines or directions of the organization and, at
the same time, a teacher role knowing the teachers’ feelings. Therefore, it was
difficult to reach a consensus on several topics without reducing or keeping
opinions of the staff members, so that the consequence would be a positive
future implementation for creating joint criteria for a better atmosphere.

- (# 5) My strengths and weaknesses have shown themselves when treating
people. Thinking about learning English, thinking about how well I felt
teaching Spanish…Most of all there is one thing that has changed: I got involved in the project, I mean, apart from my Spanish classes and doing it the best I could, this year, I have seen myself taking care of the students, not as my students but as the future of the institution. This degree of involvement is new to me. Working in a team has not become one of my strengths, but I did become aware of the need of efficient team work. I did have the feeling that we were a team.

- (# 4) To me, it has been very significant because I had never worked in a team, I have learned a lot of things and also I have learned to appreciate my work in the team and to get involved in everything that team work entails. It has been a new discovery that I like and would like to use more often.

- (# 7) The effects that team work has had on me as a member of this institution are very positive. I highlight once again the learning method that I could even use in other areas. On the other hand, I have to say that being in the evaluation team and seeing reality and my situation has created in me a feeling of uncertainty. I mean my situation as a collaborator, where will I be? Will I be able to adjust to the future situation? Will my participation be significant? I think this process is very beneficial but seeing the changing or restructuring process I see myself up in the air. That is why I have that feeling of uncertainty.

- (# 9) Of course, a great conflict (it did not seem like a conflict), was the acceptance of my duality, as a SIT employee and a CELEI employee at the same time. The good part is that I have had to learn how to make that limit or frontier clearer to CELEI and SIT and how to have a role that is not completely defined but is dual and it changes depending on the content and context where it is used. As a member of the institution, it has helped me to identify some of my weaknesses. Besides, the facilitator role let me know what I do very well inside the institution, but I could not do outside.

- (# 8) The effects that evaluation has had on me are: on the one hand, the automation of a number of behaviors extracted from a textbook and being able to apply them. In this sense, I think that my skills have improved significantly. Besides, I has helped me a lot in facing situations; it has made me more critical and self-confident when making decisions and judgments as well as knowing my limits. Most of all, it let me transmit openly to the team what I wanted to do with the institution, without complexes. In this sense,
not only what to do with the institution but also with human resources, the role of the manager, the direction I’d like to give it.

- (# 3) Actually, even more important than what I said before is what I have learned thanks to this self-evaluation, through reading and reflection. I have learned two different things: first, learning is possible. I mean, I am learning very much; second, I have learned to overcome my fear to learn certain things that were too difficult for me. Actually, self-evaluation was not the reason why I decided to learn them, it was life. Self-evaluation made me see it was not so difficult.

- (# 6) I have learned to appreciate the working plan that the evaluation team has created. It is amazing. I also felt very insecure because I thought it could end up there. However, I also had hope for improving our relation and operation. I repeat what number 5 said, we work in a team and, considering our ups and downs, we are a part of this institution. Each one may work the best they can but with hope and determination.

- (# 1) Being more professional and organized has helped me too, considering the chaos we have sometimes in the institution. I think it is positive that all these people give more. Besides, working in a team and being obliged to read documents and present certificates, reports, etc. has made me more organized in the workplace and with my own computer and materials. All this information has helped me in a professional way too.

- (# 8) One other thing I would like to emphasize is the individual effects. In my case, I have acknowledged that processes are complex and consist of many parts. This requires patience, walking step by step. To me, the time some things take, its parts, the time considerations, and the dedication needed to achieve goals are very important. It made me less impatient and frustrated.

- (# 9) To conclude, I would like to say that all this is like achieving a goal, not a big goal but for all of us it was like saying: “at last, we got this point!!!!” Seeing the report and all the materials and talking to all of you… I think it feels good, right? Then, thank you very much, since this was possible because each one of you was willing to do this. I know there are many issues we would like to discuss and continue talking about, joining our interests, etc.