DEVELOPMENT OF A STUDY CIRCLE MODEL IN A DISTANCE EDUCATION SETTING FOR PROFESSIONAL CERTIFICATION

THESIS

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ABSTRACT

This case study focuses on the research and design of a study circle model for professional certification for fundraisers in a distance education framework. The theoretical framework includes educational changes for adult learners within the context of educational philosophies, models of program planning, the history of study circles, and the various features of distance education including continuing professional education. The development of a study circle and its application within a distance education context was intended to prepare fundraisers for the professional certification examination. This thesis provides detailed descriptions of the history, planning, and process the group undertook to refine the methodology. Both the author's and the group's involvement in the design and direction of the learning experience are examined in order to extract implications that may be of interest to other professional organizations. The role of both learners and educators is explored. The thesis concludes with the author's personal reflections and guidelines for others seeking to develop study circles within professional continuing education.

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CHAPTER 1

INTRODUCTION

Professional trainers and adult educators have a wide variety of learning-content areas and methodological options to choose from. Applying methodologies from one area of adult education to another area may richly enhance the learners' quality of learning. For example, the use of humanistic methodologies such as study circles (widely used in community and empowerment learning) may enrich the learning within professional development programs. In this thesis, I examine the usefulness of applying the study circle approach within a certification program concerned with fund raisers' professional development. An especially interesting aspect of the study is that the study circle was implemented within a distance education learning program.

Background Information

During the early 1990s, I was living in Ottawa and engaged in teaching adults and ESL students. I was also engaged in training programs. In 1993, my family moved to Vancouver, and I was challenged with finding work; I became involved in fundraising. Fundraising professionals, as a group, are constantly required to upgrade their training. Fundraising is a relatively new field, or at least the importance of fundraising has increased for many agencies. Particularly in the non-profit sector, with the gradual withdrawal of government funding, agencies are now seeking external funders in new and creative ways. I took courses in fundraising, and attended seminars and roundtable discussion

groups. My past experience in adult education inspired me to examine a study circle as an aid to a distance education learning experience. I had had a very successful encounter with distance education earlier in the diploma program through St. Francis Xavier University, and I was interested in investigating how a distance-based education program might be applied to the fundraising field.

As a professional fund raiser in the non-profit sector, one of my own goals was to receive accreditation within this field. I supported wholeheartedly the professionalization of the fund raising sector and strongly supported continuing professional education in this field. I joined the National Society of Fund raising Executives (NSFRE) in 1995 and became active in attending the monthly breakfast meetings, which included speakers and training opportunities. Networking is critical for fund raising executives and I now have many friends and colleagues within the local NSFRE chapter in Vancouver.

To meet my goal of accreditation, I participated in designing a learning project to meet the needs of professional fund raisers to pass a professional certification exam, the Certification of Fund Raising Executives (CFRE). The learning project took the form of a study circle as an aid to studying at a distance.

Because I had developed a strong networking circle in Vancouver and had colleagues in all areas of the fund raising field, I was personally involved in the early formation of a group to study for the accreditation exam. This, in fact, became a pilot learning group for this thesis.

Context of the Study

While preparing for the CFRE examination, I was part of a committed group of fund raisers who banded together to review the examination material and to become re-acquainted with the vagaries of multiple choice. The group I participated in was comprised of individuals from the health, social service, and education sectors; we were eight women and three men. As we discussed how we would approach this learning challenge, I proposed using the group's experience as a study for my master's program. Along with my colleagues I helped to provide a framework for the design of the study circle and provided some guidance for the development of our model. This learning project provided me with the opportunity to examine how to effectively incorporate a study circle into a distance education learning experience.

Our learning experience was limited to a small group. We studied on our own at our own homes, at a distance from each other, and met in a more formal setting once a month to review our learning goals. We developed our own model and methodology for the monthly learning activity as we progressed in our learning experience. We had no previous experience in this type of activity. We learned as we went along and re-designed our learning activities on the basis of critical reflection.

Our major resource was the Self-Study Manual: Survey Course on Fund Raising (National Society of Fund Raising Executives, 1995). This is the requisite document for the examination. Included in our discussions were materials that

members of the group brought to our attention, or the reading list recommended by the NSFRE. There are three steps to certification:

(a) preparation and submission of a completed application by the candidate;

(b) review of the candidate's professional practice as put forth in the written application to the CFRE Professional Certification Board and staff; and

(c) examination of the candidate's knowledge of fund-raising principles, techniques, and practice through a written, multiple choice examination. The exam had 200 multiple-choice questions. Candidates were allotted 4 hours to write the examination.

Purpose of the Thesis

The challenge for me was twofold: I wanted to examine the usefulness of a study circle as a distance education tool; and, to accomplish this goal, I needed to evaluate the learning experience. Thus, I set out to learn how to incorporate a study circle effectively into a distance learning experience. My premise was that sitting at home in isolation plowing through a manual does not really get a lot of learners motivated, but the group process is so magical. In a group setting which promotes dialogue and discussion, participants have the opportunity to be engaged and involved in their own learning process.

I anticipated that the study circle would apply two insights from Caffarella's (1994) principles of adult learning. First, as Caffarella says, "adults have a rich background of knowledge and experience that should be used in the learning process (p. 30)". Secondly,

> adults, for the most part, are pragmatic in their learning. They want to apply their learning to present situations...Participants are motivated to learn

> when a variety of teaching methods are used. Participants learn both in indpendent, self-reliant modes and in interdependent and collaborative ways. (p. 30)

My overall purpose then, focused on determining how a study circle could enhance a distance education program and whether the selected methodology of a study circle can be effectively applied to the professional development examinations for professional fundraisers.

Scope and Limitations

This thesis is in the area of professional development. Its aspect is on methodological design – in particular, the usefulness of study groups for distance-based learning for professional certification examinations. As a case study, the number of participants was small (11 persons, including me). We modified and adjusted our design and process formatively as we went along. We used collaborative decision-making. However, we worked on our own in studying for the examination. The study group process extended over 11 months, during which we met as a group on a monthly basis for approximately two hours per session. During the time in between our monthly meetings, we contacted each other via telephone, fax, and e-mail communications.

In order to collect data for this thesis, I asked the group participants to fill in a questionnaire; I recorded verbal feedback; and I kept records on the process as it evolved.

Some of the limitations of the study include time limitations (2 hour sessions), group fatigue, as well as my inexperience as an evaluator. With only two hours per session to work through the assignments, and at the end of a long

working day for all participants, a discussion on the evening's discourse and decision was quite taxing. A more experienced evaluator would have predicted these challenges and developed a strategy to overcome such evaluation obstacles. I originally planned to telephone everyone at the end of the learning program, after the examination, but I did not follow through with this initiative because I did not have time. This would have provided valuable feedback on the whole learning process and my inaction clearly hindered my data collection.

Assumptions

Although I initially began with a comprehensive evaluation approach during the first couple of meetings, including a questionnaire and invitation for feedback, I subsequently assumed that this was not appropriate because it would take too much of their time. Subsequently, I took a more passive role in data collection, relying on my notes and verbal comments made throughout the sessions. My assumptions therefore limited the amount and quality of data I collected as I then relied on my notes and memory.

Definitions

Andragogy is a philosophy of the adult learning process. Malcolm Knowles identified key assumptions of andragogy including: adults want control and responsibility for their learning; they bring a variety of experiences to their learning; and adult learning efforts are problem centred. Knowles theorized that factors motivating adults to learn come from within the individual.

Distance education enables learners to study at a distance from their teacher. In this study, the teachers were those who developed and distributed

the Study Manual. As the professionals who created the manual, it was they who decided the material to be learned and they represented the accreditation team for the organization. The learners were the professionals in the local NSFRE chapter--including me-- who desired to study, learn, and pass a certification examination.

Study Circle is an educational intervention which involves a small self-guiding group in discussion and learning. Our study circle involved learners and educators as we developed a methodology to learn the required material.

Listserv is an electronic list of e-mail addresses on a computer. When one sends a message via listserv, the message is sent to all subscribers. Also, once subscribed, one receives every e-mail message that other subscribers send to the listserv. Members of the study who had access to listserv communicated with each other via this method of communication.

Plan of Presentation

Following this introductory chapter, in chapter 2, I review the literature which provides the theoretical framework. The literature review includes a discussion of educational change and its impact on learning; the philosophies of education; and the fundamentals of distance education and its application for professionals. In chapter 3, I describe the project and the experiential learning. This chapter focuses on the refining of the methodology and the evolution of the study circle. Chapter 4 will provide a final overview and recommendations for future learning programs for professional fund raising certification in a distance education/study circle model.

CHAPTER 2

A REVIEW OF THE LITERATURE

In order to develop a theoretical framework for this study, I reviewed selected literature. I present this literature in five main sections. In the first section I review educational change and how education can meet the needs of adult learners. Next I review the key factors for an effective learning environment, including psychological, physical, and philosophical factors. In the third section I review program planning and design. Then I review what a study circle might look like based on the literature. Finally, I examine distance education technology and provide various components, including continuing professional education within distance education programs and technological advances.

Educational Change for Adult Learners

Writers throughout the field of adult education share a common theme--adult learners face a dramatic pace of change. Burton (1992) captures this in her comment:

> The only constant in the emerging world is change--and the accelerating rate of change. Hierarchical corporate structures under the old economic order are being replaced by a spider web of activity whose strands reach all over the world. A technology induced redefinition and reorganization of work, coupled with the need to manage change will inevitably break up the present boxes of school, work and retirement. The coming interweaving of work, learning and life calls for a new flexibility and a rethinking of our industrial-age institutions--political, economic and social. (p. xv)

Adults are facing exponential change and the demands on their knowledge and skills are increasing daily.

Characteristics of Adult Learners and How They Learn

Caffarella (1994) describes some key characteristics of adult learners. For example, adult learners can and do want to learn, regardless of their age. She states that adults have a rich background of knowledge and experience that should be used in the learning process. In addition, adults are pragmatic in their learning and they want to apply learning to their present situation (p. 30).

Burton (1992) states that another essential ingredient for effective learning occurs when learners are involved in the process of planning their own learning (p. 48). This premise supports Mezirow's (1991) advocacy that learning should be self-guided and self-directed (p. 225).

Continuing Professional Education

The general principles advocated for adult education should apply equally to adult learners in a continuing professional education setting. Sork and Welock (1992) state that adult education has many purposes, including "empowerment of learners, increased competence of those who live in a rapidly changing society, promotion of critical thinking, and facilitation of adult learning (p. 116).

Baskett and Marsick (1992) cite material from a variety of sources suggesting most continuing professional education is informal in character. They say, "Studies of learning patterns of professionals have shown that, by and large, formally arranged continuing professional education (CPE) programs are much less used than is self-directed and self-planned learning" (p. 9). This area of continuing education for professionals is one where distance education

through technology could be particularly effective. Professionals fulfill many of the demographic characteristics of people most probably to participate in adult education. They have the financial resources to pursue continuing education; and, likely exposed to technology in the workplace, they may have less fear of technology than others with little or no exposure. Time pressures of employment require flexibility for continuing education, and the need to be up-to-date in their profession may require knowledge, which is global rather than local in nature. As Burton (1992) notes, much of this change is based on technology (p. xv). In light of Canada's rapidly changing society, professional education programs are certainly called on to provide increased competence in response to new challenges.

Change in Educational Technology

The world is undergoing a pace of change almost unimaginable. Less than 35 years ago, only a handful of computers existed in Canada. Computers in universities were guarded and controlled by a white-coated priesthood, but by 1996, more than half of Canadians report they can use a computer (Lewington, 1996). Elementary school children now use computers for simple (and occasionally more complicated) tasks as easily as they change the settings of the clock on a VCR. The Internet, until recently a sort of pneumatic tube messaging system for scientists, has grown in the last 10 years into an industry employing thousands of people. This tremendous change in technology has

influenced nearly every occupation, including education. Nevertheless, as Kidd (1973) cautioned almost 3 decades ago:

> It should be quite clear that learning cannot and should not be identified with gimmicks and devices, or special forms of organization. Yet there are many factors for the setting, the emotional climate and the ways that learning are organized that cannot be disregarded. (p. 234)

Adult educators and adult learners are called upon to advance learning in this new and complex learning environment; new tools and skills must be adopted to meet changing demands in a sophisticated technological society.

The Learning Environment

Adult educators have stressed the importance of the educational environment as part of the learning process. The learning environment has psychological, physical, and philosophical underpinnings. This focus on environment raises new questions in the context of distance education and the use of technology. However, the needs, emotions, and abilities of the adult learners cannot be overlooked in this race for better and better learning technology.

The Physical and Psychological Environment

Burton (1992) and Knowles and Associates (1984) point out the importance of physical comforts and how they can facilitate or hinder learning. Factors in the physical environment include lighting, meeting time, air circulation, chair and table arrangements, provision for water, coffee and other drinks, breaks, as well as accessibility, and transportation and parking facilities.

Burton (1992) says that the physical climate should be appropriate, but more important is the psychological climate. This should be one which "causes

adults to feel accepted, respected and supported; in which there exists a spirit of mutuality between teachers and students as joint inquirers; in which there is freedom of expression without fear of punishment or ridicule" (p. 46).

One of the first issues to confront adults in many learning programs is gathering in a group. Napier and Gershenfeld (1999) state that anxiety is the most powerful factor altering people's individuality in groups. This factor should be taken into consideration by educators as they strive to create a secure learning environment. As Napier and Gershenfeld state:

> When people enter a group, anxiety is the first apparent behavioral symptom--that is, change in their actions. Accurately or not, they feel endangered by the other members. They feel self-doubt about how the others perceive them--and how they perceive the others--and their behaviour is based on these feelings. . . Because most people feel such uncertainties in new situations involving strangers, anxiety is to one degree or another the prevailing emotion at the start of any group setting. (p. 5)

Burton (1992) suggests that adults feel more valued as adults in an informal atmosphere than they do in a traditional education environment with its formal structure and status differences between the teacher and the learner. In response to Mager's proposition (as cited in Sork, 1991, p.67) that people will learn anything if their lives depend on it, Sork says that "perhaps the key to application of learning resides in the learner's perception of how important the new learning is to his or her ability to work effectively in the setting where the application must take place" (Sork, p. 67)." Adult education practitioners must, therefore, address a variety of psychological and professional needs when planning successful learning projects.

Knowles and Associates (1984) identify seven components of andragogical practice and the first of these components stresses the learning environment. They call for a learning environment that is psychologically conducive to learning. This is achieved both by physical arrangements (such as circular seating arrangements) and psychological arrangements that encourage mutual respect, emphasize collaborative learning and mutual trust, and where learning is pleasant. They define such a caring, respectful, helping, and accepting climate as a "climate of humanness" (p. 101).

Offering adult learners a climate of humanness becomes a challenge, especially in an era characterised by rapid change. Adult learners may bring emotional elements to the classroom. These elements include a possible legacy of bad earlier learning experiences, fear of their own abilities, and fear of new technology that faces them both in the workplace and in the classroom.

Kolb (1984) describes the psychological climate many adults find themselves in when they approach an adult education experience:

> Many approach education and mid-life with a sense of fear "I've forgotten how to study" and resentment based on unpleasant memories of their childhood schooling...adults' learning interests are embedded in their personal histories, in their visions of who they are in the world and in what they can do and want to do. (p. 6)

These authors show clearly that there are factors to consider in creating a safe and healthy environment for learners. Fear is a key part of the psychological learning environment and it is present to some degree in every learner returning to education during their adult life. As well, an educator's philosophical orientation influences the learning environment, as seen next.

Philosophical Underpinnings

Educational thinkers have developed a variety of philosophical frameworks. Different writers have found different ways to group their thoughts on educational philosophy. Apps (1973), for example, describes five educational philosophies he calls essentialism, perennialism, progressivism, reconstructionism, and existentialism. Essentialists subscribe to a traditional approach to education. Perennialists focus on activities to discipline the mind, including memorization, reading, writing and drill work. Progressivists oppose authoritarianism and favour experience as a basis for knowledge. Reconstructionists rely on scientific methods to discuss truth; truths change as problems change. For Existentialists, what a person is capable of knowing and experiencing is more important than what he or she knows. Elias and Merriam (1980) identify the major trends in educational philosophy as being liberal, progressive, behaviourist, humanistic, radical, and analytical. These philosophical theories consider both content and methods of delivery as important elements in the learning process.

A key consideration in this section is the effectiveness of these methods of delivery. Consideration of this effectiveness must be based on both evaluative studies of program delivery and on some form of theoretical basis. Elias and Merriam stress the importance of examining philosophical underpinnings, especially when it comes to questions of theory and practice. As they put it, "Theory without practice leads to empty idealism, and action without philosophical reflection leads to mindless activism" (p. 4).

Many adult education researchers have attempted to correlate philosophical underpinnings with what can be described as the field's tools and techniques. These philosophical beliefs have important impacts on the ways in which programs are delivered and even on what tyes of programs are delivered. The radical ideas of Paolo Freire (1970), for example, are inconsistent with a teacher-dominated program delivered exclusively through lectures. As he reveals in his criticism of teachers who use students only as depositories of information. "Apart from inquiry, apart from praxis, men [sic] cannot be truly human" (p. 58).

These philosophical underpinnings have been the subject of many writings over the last century and have been an important part of many recent works. Kolb (1984), like many others, leans heavily on the earlier work of theorists such as Dewey and Piaget in his work on experiential learning. Mezirow's (1991) work on the transformative dimensions of adult learning stresses the importance of educators being aware of the consciously or unconsciously held philosophical beliefs that guide their work. Mezirow also states his reliance on the work of earlier writers such as the German sociologist Jürgen Habermas, whom Mezirow considers the most influential contemporary social theorist.

Economist John Maynard Keynes (1970) notes the importance of reliance on earlier thought, both consciously and unconsciously. As he says "Practical men [*sic*], who believe themselves to be quite exempt from any intellectual influences, are usually the slaves of some defunct economist" (p. 383). One can perhaps exchange the term educational theorist for economist. In the remainder of this section I rely mainly on the ideas of Elias and Merriam (1980) to provide a

short overview of some of the philosophical orientations that have been foundational within adult education.

Liberal education. Elias and Merriam (1980) define liberal education in terms of educational outcomes. "Liberal education produces a person who is literate in the broadest sense--intellectually, morally, spiritually and aesthetically" (p. 26). Liberal educators are critical of the utilitarian and vocational direction taken by education since the advent of progressive education (seen below).

Within liberal education, a prominent role is given to both the teacher and the lecture method. Elias and Merriam refer to Edgar Friedenberg, who calls attention to the important political role liberal education plays. Friedenberg sees liberal education as a way "to teach persons the value of freedom and help them to become competent to use it" (p. 33). Liberal education, in Elias and Merriam's view, is guided by the teacher both in its content and its delivery.

Progressive education. Elias and Merriam (1980) provide an overview of the origins of progressive education. It is based on rationalist, empirical, and scientific thought that developed first in Europe, and then became predominant in the United States. They cite political philosopher Rousseau, for example, as recommending that all learning until age 12 should come from experience.

The principles of progressive education include a broadened view of education; a focus on experience; a focus on learners and their needs; and new methodology, including the scientific method. As Elias and Merriam explain, "Progressive education's emphasis upon vocational and utilitarian training, learning by experience, scientific inquiry, community involvement and

responsiveness to social problems found expression in the development of new forms of general and adult education" (p. 52) such as vocational education, university extension, and cooperative settlement houses for new immigrants and "Americanization" education.

Behaviouristic education. Behaviouristic education, Elias and Merriam say, emphasizes control, behaviour modification, learning through reinforcement, and management by objectives. It stresses concepts such as competency-based teacher education and depends on accurate identification of needs. Skinner (1978), one of the most prominent behavioural theorists, criticizes thinking that could leave learning decisions to the student. Like liberal education, this model of learning stresses a powerful role for the teacher both in choosing and delivering curriculum.

Humanistic education. Elias and Merriam (1980) point out that humanistic education is rooted in existential and humanistic psychology. Its key concepts are autonomy and freedom, trust, cooperative action, participation, and self directed learning. According to the Elias and Merriam, "Simply stated, the goal of humanistic education is the development of persons--persons who are open to change and continued learning, persons who strive for self actualization and persons who can live together as fully functioning individuals" (p. 122). As such, the focus is on the individual rather than the body of information. The teacher is a facilitator and helper. Humanistic education focuses on the importance of interpersonal relationships in the learning process.

Elias and Merriam stress the importance of small groups and teams as part of the instructional technique.

Radical education. Elias and Merriam (1980) place the roots of radical education in anarchism and Marxism, where educators see learning as a force for social change. "Education in this viewpoint is closely connected with the social, political and economic understanding of cultures, and with the development of methods to bring people to an awareness of responsible social action" (p. 11), they say. Freire (1970) stresses the importance of inquiry by the students and emphasizes the role of education in creating citizens who are socially aware and responsible.

Analytical education. According to Elias and Merriam (1980) analytical education that has its roots in logical and scientific positivism. It emphasizes the need to clarify concepts, arguments, and policy statements used in adult education. Analytical educators try to establish a strong philosophical background for adult education. This earlier foundational framework for adult education suggested that different approaches are by no means completely contradictory in all regards. For example, within this foundational framework, the radical theory of education put forward by Freire and others in no way contradicts the focus on self-directed groups outlined in a humanistic view of education.

Houle (1980) complements these foundational philosophies with three modes of learning. His first mode, inquiry, is a process of creating some new synthesis, idea, technique, policy, or action. This focus on critical self analysis could be drawn from a radical perspective. His second mode, instruction, is "the

process of disseminating established skills, knowledge or sensitiveness" (p. 32). The focus on transmission of skills could be drawn from a behaviourist perspective. His final mode, performance, is the process of using an idea or practice habitually so that it becomes a part of the learner's fundamental approaches. The importance of learning through experience can be drawn from progressive thought in educational philosophy. The educational philosophy an educator chooses inevitably influences the planning of programs.

Aspects Of Program Planning

In this section I examine models of program planning and evaluation.

Models of Program Planning

Caffarella (1994) offers a guide for program planning that spans education programs within the areas of individual, organizational, and community/societal change. She is concerned as to why program planning models are not routinely used. She cites four major reasons why this may occur: time pressures, organizational climate, lack of knowledge about available models, and belief that models are too confining to be helpful. With regard to the third reason, the lack of knowledge available:

> Often persons responsible for planning programs are not aware that there are models of program planning available for their use. This is not surprising, because many adult educators and trainers are content specialists first and have not been exposed to materials related to program planning. (p. 11)

Sork (1991) points out yet another reason; educators often rely on what has worked successfully before as a basis for planning. They are often hesitant to risk trying something new. As he explains:

> Success is wonderful...A great deal can be learned about good educational planning by reflecting on our successes...But focusing exclusively on success ignores the potent learning opportunities afforded by failure. If we are doing our jobs as educational providers well, then the occasional failure is inevitable. Although I know of no studies done on educational planners reported to be "highly successful," I suspect that one characteristic they share is an uncommon willingness to take risks. And wherever there is risk-taking behavior, there is failure. (pp. 5-6)

Strother and Klus (1982) further demonstrate the concern about educators' fear of risk:

> One difference. . .between the successful and the unsuccessful planner lies in the ability to contend with risk and uncertainty. Contending with risk and uncertainty does not imply avoidance of either. Some very successful planners have a significant number of failures simply because they allocate a portion of their effort and resources to innovative experiments and count on a favorable payoff ratio of successes over failures. And even their failures are instructive. (p. 69)

Caffarella (1994) maintains that planning should relate to the primary purpose for conducting the adult educational program, which can be to promote personal growth, to help people resolve a practical problem in their life, to help people prepare for a work opportunity, to enable an organization to adapt to change, or, to examine community issues. She promotes an interactive approach to program planning and recommends 11 components in this approach. However, she emphasizes that not all11 components may be necessary for every learning experience. The key to this model is its flexibility--program planners can apply the components in different ways to meet the needs of the learners and the goals of the learning program.

Caffarella (1994) indicates that the most difficult challenge is to develop the program objectives. Defining program objectives requires the planner to define the outcomes, which can be elusive:

> Program objectives focus primarily on what participants are expected to learn as a result of attending a specific educational or training program. This learning may result in changes in individual participants, groups of learners, organizational practices and procedures, and/or communities or segments of society. (p. 100)

According to Caffarella's (1994) model, some outcomes will be measurable, others will be non-measurable. As well, there will be intended achievements and unanticipated achievements. Program planners should be aware of these possibilities and should develop program outcomes with these possibilities in mind so that unanticipated achievements can be highlighted.

The key principles of learning outcomes are similarly described by the Centre for Curriculum Transfer and Technology (1998): "The learning outcomes approach to curriculum based programs and curriculum design, content, delivery and assessment on an identification of the knowledge, abilities (skills), and attitudes (values) needed by both students and society" (p. 1). In addition, the Centre for Curriculum Transfer and Technology claims learning outcomes are educational goals and should be assessed, but the assessment process should not limit outcomes. Assessment should be seen as playing a crucial educational function by providing a means for students to practice integrative application of their learning and receive useful feedback (Centre for Curriculum Transfer and Technology, n.d., p. 1).

Once a planner has developed the learning outcomes for an educational program, how does he or she implement the transfer of learning? Transfer of learning simply means that what has been learned is something participants use

after the program is completed. It is the effective application of something learned. Program planners need to be aware of learning objectives that identify the skills, knowledge, or attitudes the learner should be able to demonstrate at the end of the learning program. Educators must plan for the transfer of learning. Caffarella (1994) discusses the influencing factors in the transfer of learning: program participants, program design and execution, program content, changes required to apply learning, program content, organizational context, and community/societal forces. According to Caffarella, the program planner needs to identify three key elements: when the transfer strategies should be employed; the key players involved; and the strategies in applying what has been learned. The planner also needs to plan for the evaluation of outcomes and of the program process.

Program Evaluation

The fundamental element for evaluation is feedback. Program evaluations can be systematic or informal. Evaluations can occur prior to, during, and after the learning program. As Caffarella (1994) states:

> Program evaluation is a process used to determine whether the design and delivery of a program were effective and whether the proposed outcomes were met. Evaluation is a continuous process. (p. 119)

Napier and Gershenfeld (1999) explain how appropriate feedback can increase support for the learning program:

> The most powerful form of feedback is the human response. Optimal learning requires sensitivity and judgement in the feedback process, and for this reason, human response remains the most powerful instrument. In a group, honest feedback can increase accuracy, instill a sense of being understood, and promote closeness and a sense of confidence. It can also increase defensive communication and the level of guardedness. (p. 35)

Napier and Gershenfeld (1999) further indicate how they would implement the feedback process in a group setting. They explain that participants can spend time discussing the meeting and determining what worked and what did not work. Thus, participants can focus on future behaviour and plan the next meeting more effectively. Participants can also be invited to make notes of behaviour that facilitates or diminishes the learning process. By reviewing the process immediately after the meeting, the group will likely accept more easily any suggested behaviour changes. Through implementation of discussion and feedback, the group will develop increasing support and openness which will be conducive to enhanced learning.

Caffarella (1994) suggests that collecting evaluation data can be done in a number of ways including: observations, interviews, written questionnaires, tests, product reviews, performance reviews, organizational/community records and documents, portfolios, and cost-benefit analysis. She further suggests that the program planner has five major tasks in conducting evaluations. These tasks include: examining informal evaluation opportunities; determining how the data will be collected; determining how data will be analyzed; describing how judgements will be made about the program; and developing recommendations for programming based on those judgements.

Finally, as part of program planning, educators should consider how best to prepare reports on the educational programs. Caffarella (1994) explains:

> Reports on educational programs may fill one or more major functions. A report can be used to educate and gain support from key people and groups, to facilitate and inform decision making about current and future programs. (p. 229)

Reports can be distributed to the participants, past and future, as well as to regulatory or licencing agencies, which is particularly applicable for the purpose of this thesis.

Percival (1993) has developed a model for program evaluation that includes these key points: (a) identify why and decide what to evaluate; (b) identify who will do the evaluation, and what and how data will be collected; and (c) analyze the data and make program recommendations. Percival claims that evaluations have multiple purposes because there are so many stakeholders involved in a learning program. Administrators, teachers, participants and continuing educators will all require separate approaches to evaluation. "While learners certainly must be included in the evaluation process, it is an oversight not to include representation and input from other stakeholders to the program" (p. 134). In the next section, I examine why and how study circles can be incorporated into program design.

Study Circles

Barski-Carrow's (1998) thesis, "Using Study Circle in the Workplace as an Educational method of Facilitating Readjustment after a Traumatic Life Experience" provides considerable background on study circles. Barski-Carrow maintains that a study circle is primarily an educational invervention, as discussed next.

The History of the Study Circle

Barski-Carrow (1998) provides a history of study circles in the United States. Study circles emerged in the United States around 1878 as "one element of the Chautauqua Movement, a name derived from Lake Chautauqua, a campsite where Sunday School meetings were held" (p. 39). Bishop John H. Vincent created study circle groups from the "individuals who attended the Chautauqua Literary and Scientific Circle (CLSC)" (pp. 39-40).

> The CLSC developed printed study circle materials for use by small groups to study subjects such as history, art, language and literature. This reflected a fresh collaborative and interactive approach to adult learning and education different from the traditional classroom format. By 1878, 15,000 "home study circles" could be found across America. . . .Study Circles were utilized mostly in public affairs organizations, bible study groups, literary groups, and art groups. (p. 40)

Barski-Carrow (1998) also discusses the earlier implementation of study circles in Sweden. In the 19th century, Sweden was a country challenged by political and social movements. Study circles served as vehicles for popular movements and brought people of all types together. In Sweden, the study circle is focused on a simple goal--to empower people. According to Barski-Carrow, study circles have been used mainly by community groups in Sweden. She examined the development of study groups among organizations in the United States and found that unions and labour organizations also have used this learning vehicle for member education. Her research further confirms that, in a typical study group, every view is considered.

Planning the Study Circle

The study circle model provides an excellent opportunity for an educational intervention to bridge a distance education program with group learning and interaction. Applying Caffarella's (1994) program planning recommendations to a study circle, a program planner would develop program objectives and methods for the transfer of learning, as well as a plan for evaluation and an appropriate delivery format. Open dialogue and reflection is essential to the process, both for current and future planning issues.

Barski-Carrow (1998) states: "Since Study Circles are driven primarily by the participants' needs, it is appropriate that the subject matter should drive the Study Circle" (p. 45). Further, people learn in a participatory environment "reflecting on and integrating new information received about the topic being discussed" (p. 45).

Although Blid (1990) does not support the use of pre-packaged materials, Barski-Carrow (1998) discusses the necessity of pre-packaged materials. As Barski-Carrow suggests, flexibility is a key element in the design of a study circle; the choice to use materials in a study circle is an important element in the study circle process.

The Study Circles Resource Centre in Pomfret, Connecticut, sees the study circle as an effective educational intervention:

> A study circle is an informal, face to face, small-group discussion of social, political, and community issues sustained over a period of time. It is small-group democracy in action. Individual members take responsibility for the study circle and ultimately control both the content of the discussions and the group process. (p. 1)

Andrews (1992) offers insight into the use of study circles. He suggests that, because study circles are growing in popularity, this growth demonstrates that people are discovering that they are in control of their own education. "This reflects a growing conviction that there is a collective wisdom in groups, that education and understanding go hand-in-hand, and that learning can truly be available for all" (p. 23). In Andrews' model of study circles, he explains that participants share experiences of reality: "They may not agree, but they learn to accept that--just like blind men feeling different parts of the elephant--each person may be limited by his or her own perspective" (p. 23).

Andrews maintains that each participant feels empowered to think for himself or herself and that "anxiety about appearing foolish is lost" (p. 23). There is no right answer and all are free to participate in a relaxed manner. Andrews' model includes written materials as a basis for discussion. For Andrews, any discussion proceeds on the understanding that equality among participants is fundamental to the process. In her model, the facilitator is used to facilitate the group and is not involved as an expert. In fact, Andrews (1992) maintains that "participants seldom take part just to learn the facts. The importance of what they learn lies in its connection to their lives, their own experiences, and the real problems and issues they face" (p. 23). Andrews provides some good advice for successful study circles, including: "maintain an open mind; strive to understand the position of those who disagree with you; . . .and value your own experience and opinions" (pp. 22-23). Similarly, Ferris and Wagner (1985) identify three fundamental principles for quality circles: (a) group performance is superior to

individual performance, (b) workers desire participation, and (c) participation improves productivity (pp. 155-157).

The Study Circles Resource Centre also provides an overview of a study circle online, including face-to-face small group discussion, pre-packaged materials, and how study circle participants teach and learn from each other. As is explained, participants educate each other by sharing ideas and experiences.

Napier and Gershenfeld (1999) discuss quality circles, which they categorize as a form of self-help group. Their discussion of the development of self help groups has applications for study circles. They provide a developmental model for self-help groups based on the work of Katz. Katz's model (cited in Napier & Gershenfeld, 1999, pp. 480-481) provides three major components. The origin marks the beginning stage with the presence of the founder. This individual assumes responsibility for getting the group together. Founders are often charismatic and have the ability to organize and mobilize members of the group. In addition, the founder provides the vision and will set initial guidelines. The second component is the informal organizational stage. At this point in the development of the group, the role of the founder typically decreases and others in the group informally share the responsibility for organizing the group's activities. Finally, as the group develops cohesion, new leadership emerges and individuals take on increased leadership roles as the group flourishes.

Katz's model (as cited in Napier and Gershenfeld, 1999) continues to discuss beginnings of formal organization and of professionalism. Formal

organization is required when a group continues to grow in size. The beginnings of professionalism--the last stage--occurs when the group has reached a level of sophistication which requires the engagement of professionals to carry out its mandate (Napier & Gershenfeld, pp. 480-482).

Napier and Gershenfeld (1999) provide guidance for what they refer to as self-help groups:

> One way to increase the effectiveness of self-help groups is for members to receive instruction in group leadership and communication, creating and understanding positive group norms, and dealing with group issues such as sharing session time and realizing that problems often have more than one possible solution. (p. 482)

Study circles provide an opportunity for participants to develop and enhance their learning in a number of ways. I will examine the relationship of study circles and distance education next.

The Study Circle and Distance Education

A study circle can provide the bridge between distance education and the isolation distance education can bring. For example, Coulter (1989) specificially identifies the isolation associated with distance learning for women (p. 12) as discussed later. She queries whether distance education can create an empowering and liberating experience for the individual and the collective (p. 20). Similarly, Yeaman (1994) identifies the individual's continuing need for social contact and human interaction: "the knowledge base of educational technology includes science but the practice of educational tehcnology is not the practice of science (p. 19). Yeaman emphasizes that "postmodernists

understand that the biggest human difficulties must not be repaired by technological fixes (p. 16). "

Hayduk (1994) suggests that "historically, the development of distance education technologies negated time and space as barriers to education (p. 44)." Thus, distance education has created access to previously untapped students.

In the previous subsection, Andrews (1992), Barski-Carrow (1998), and Caffarella (1994) each offered several elements to consider when setting up a learning program. Attention to the learning environment, communications processes, feedback, and evaluation are all relevant factors. Setting up a study group should be managed with the same attention to detail as setting up any group learning experience. One can easily follow the suggestions of Caffarella (1994), Napier and Gershenfeld (1999), and other experienced planners. However, a study circle is not a common distance education tool. In my next section, I examine additional aspects of distance education that can contribute to creating a successful learning experience.

Distance Education

Distance education is a structural approach to learning whereby the teachers and the students are not involved regularly in face to face interactions. Rumble (1986) discusses the origins of distance education, and Verduin and Clark (1991) explain that "distance education might be any formal approach to learning in which a majority of the instruction occurs while educator and learner are at a distance from one another" (p. 8). Roantree (1992) describes distance education as "learning while at a distance from one's teachers--usually with the help of pre-recorded, packaged learning materials. The learners are separated from their teachers in time and space but are still guided by them" (p. 29). Because of these unique aspects, the underlying philosophies, methodological applications, and socialization aspects of learning may differ from those of classroom-based learning.

Philosophies of Distance Education

Rumble (1986) clusters models of distance education into three groups: an institution-centred model, a person-centred model, and a society-centred model. The first of these, which he describes as treating learning as a process that involves the storage and retrieval of information, includes both a liberal philosophy and a behavioural philosophy. The person-centred model, he suggests, approaches education from the humanistic perspective placing the emphasis on personal growth. The third model, society-centred, is based on social action and interaction, wherein the main goal is social change.

Other researchers draw their analyses from different views of education. Lindeman (1961) argues for the validity of this mixing of viewpoints, saying, "Light comes from learning--just as creation comes everywhere--through integrations, synthesis, not through exclusions" (p. xxvii). How does the use of technology fit within these various models? Does the technology itself impose a structure that limits its validity to one school of educational thought? Or, as Lindeman suggests, can it have broader applications through integration and synthesis?

Not a great deal has been written analyzing distance education from the perspective of philosophical models. The few writers who have examined the question, however, have reached widely different conclusions about future trends. For example, Rumble (1986) suggests the majority of distance formats within formal education are "institution centred, inspired predominantly by systematic models of education. An over-riding concern often appears to be that of making the system as efficient and cost effective as possible" (p. 26). Rumble says this efficiency can be achieved "at the expense of diversity and flexibility in the range of educational models" (p. 26). He suggests that distance education must not necessarily take an institution-centred approach. For example, "a person-centred model emphasizes the negotiation and agreement of individualized programmes of study that are incorporated into a learning contract" (p.30).

Roantree (1992) suggests computers are best known for providing direct teaching using pre-programmed courseware. He balances this view, however, with the comment that "oddly enough, computers can also make it possible for people to talk to one another" (p. 113). As noted earlier, Coulter (1989) raises concern about the isolation of students in an institution-centred model of distance education. She illustrates how women are often attracted to distance education because it offers them the ability to study from home; but she cautions: "It is precisely the home-study character of most distance education that leads many feminist academics to criticize this form of learning as contributing to even further women's isolation in the home" (p. 12).

Rumble (1986) claims that the isolation of students is the darker side of distance education. She points out that although "many distance educators see this as a problem which needs to be overcome through the establishment of local centres or use of new communications technologies, politicians may see positive advantages" (p. 9). She concludes, more optimistically, that institution-centred distance education is likely to be replaced by "a networked organization in which a large number of linked sub groups and individuals (particularly at the middle management level) will begin to interact with each other using fluid and overlapping channels of communication" (p. 198).

Coulter (1989) suggests that educators have choices in distance formats. She argues that distance education, with its tools and techniques, is inherently neither appropriate nor inappropriate but simply an approach to education which

can increase women's choices. "The challenges facing distance education," she says, "faces all self-critical teachers.

Verduin and Clark (1991) maintain that there is an urgent need in the United States for a highly skilled and educated labour force. In their view, distance education can play an important role in this effort, which may occur during a period of slower growth when such cost-effective methods may gain in importance.

Hayduk (1994) discusses education and niche markets in conventional educational institutions, noting that, "historically, the development of distance education technologies negated time and space as barriers to education" (p. 44). He points out that:

> large numbers of students, acting independently, have been able to meet their individual programme needs more easily via distance study than by using the curricular possibilities available at their conventional "home" institution. . .It meets real needs more effectively than any other currently available option. (p. 44)

Can education, as Coulter (1989) queries, be made an empowering and liberating experience both at the individual and collective levels? (p. 20)." Coulter's conclusion appears to summarize much of the present thinking among educational writers. Although severe problems may exist, they all seem to suggest the means will be found to overcome these problems.

Features of Distance Education

Rumble (1986) considers some of the implications of features that are intrinsic to the nature of distance education:

> The separation in space and time of teaching and learning is a basic feature of distance education. . . .What is particular to distance education practice in this respect is that the overall design of a system is premised on this separation, and that therefore the role of the teacher, and the nature of the transactions between teacher and learner, are completely changed. (p. 11)

Burge (1993) defines distance as more than geography. "Distance educators," she says, "define distance as those logistical, economic, geographic and cultural separations between providers and potential students" (p. 219). Barriers include whatever makes it difficult for people to access the education and training they want. Burge includes such structural barriers as timing of courses, location of classes, and lack of day care in this discussion.

Stewart, Keegan, and Holmberg (1988) include the following features in distance education: separation of teacher and student; influence of an organization, especially in the planning of learning materials; use of technical media; provision of two-way communication; possibility of occasional seminars; and participation in the most industrialized form of education.

Yet another feature of distance education, Rumble (1986), and Verduin and Clark (1991) explain that two-way communication between the individual student and his or her mentor is an essential component of a distance education system.

In order to fulill the requirements of two-way communication, distance education requires the use of technical media transmissions such as tapes, telephones, teleconferencing, computers, and mail.

Hayduk (1994) outlines the core attributes of distance education saying distance education teachers and learners are separated in space, and frequently in time, during the teaching/learning process. The educational content of a given distance education course is carried by some technical medium, for example print, or television. Distance education students are typically provided with some form of two-way communication for the purposes of feedback, motivational support, and so on. Hayduk adds that distance education emanates from a formal educational organization rather than from an individual instructor and that in distance education, course delivery is a separate activity from course development. Distance education is the most industrialized form of education, according to Hayduk. He also delineates some of the benefits of distance education: the substantial economies obtained through large scale production; cumulative course improvement occurs with each revision cycle; and quality control standards which may be more easily and consistently applied in distance education (p. 46).

McCullough and McCullough (1994) point out the challenges facing adult educators in today's fast paced society. For many learners, job and family obligations compete for their time to gain skills and acquire knowledge. Education providers need to discover "more efficient and timely means to deliver

their services" (p. 28). Technology, they suggest, can aid in this process, but this requires intelligent choices among the array of technologies available. In short, the authors reviewed in this subsection vary in their approach to distance education from a fairly narrow interpretation of distance as being geographic to Burge's broader interpretation of distance education that includes factors such as cultural and economic barriers.

Examples of Applications of Distance Education

Distance education is currently in a state of rapid change. Books written on the topic only a few years ago are already outdated. Contemporary instruction is found in journals, such as *Educational Technology* and *The American Journal of Distance Education*. However, some of the issues contained in books written several years ago are still relevant for framing the topic of applications of distance education.

In order to examine the issue of distance education in professional development, Verduin and Clark (1991) claim that it is necessary to look at the applications of distance education in the workplace. They explain that,

> There is an urgent need in the United States for more and better adult education in the near future, as the gap between the education of workers and the skills required for jobs continues to grow. Distance education may play an important role in this effort, which will occur during a period of slower growth when such cost-effective methods may gain in importance. (p. 210)

McCullough and McCullough (1994) discuss the overall recruitment of learners when a distance education format is used for delivery, curriculum, and instruction within this kind of format. As an application of adult education, they suggest mobile learning laboratories are an effective tool for rural areas. Concerning curriculum, they stress the need to match the capabilities of the learners and their needs. Educators, they say, have new responsibilities such as proficiency in the use of technology, and the development of ethical, well trained professionals in the field (p. 29).

Chacon (1992) addresses the use of computers in his discussion of the applications of distance education. In his examination of the use of computer media in distance education, he explains that the computer can be seen as extending three major processes of the learners' and educators' behaviour: information processing, interaction, and communication (pp. 12-13). He terms these processes computer-user modes.

Heinrich (1996) suggests the Internet is a tool which can be used to overcome distance and time barriers for adults engaged in professional development and points out that it "provides opportunities for networking with colleagues, learning about developments in the field, finding new resources, and establishing a sense of community among otherwise isolated members of the adult education community" (p. 9). As one way of networking, Heinrich describes a process whereby a person sets up an account with an Internet service provider and then subscribes to a list. In this application, the user then sends a message

to the list which is subsequently distributed to all subscribers via their e-mail connection. This system allows for ongoing dialogue and eliminates the isolation professionals sometimes feel. Heinrich provides examples of organizations which have engaged in innovative methods to deliver professional development experiences. These include teleconferences, guided study, electronic conferences, and self-directed learning.

Still on the topic of the Internet, in addition to list servers which distribute any messages sent to the service to all subscribers, Heinrich (1996) describes other Internet tools such as Gopher servers and the World Wide Web. These allow people access to information on the net with little training or experience. The Internet itself provides massive access to the current discussion on the use of educational technology in the use of distance education. The access, in fact, is so extensive that it presents one of the weaknesses of this medium. For example, the Alta Vista search tool from Digital Computers returns 400,000 possible "hits" when asked to identify World Wide Web pages containing the words "distance", "education," and "technology." The Open Text search tool provides 5,000 hits when using the same search terms. Besides the user overload in these cases, many of these thousands of sources are of little value.

Looking farther afield, an example of a very ambitious continental distance learning project is the European Association of Distance Teaching Universities (EADTU). It utilizes a number of applications for distance education. Likewise, the Open Learning University of the Netherlands (1996) hosted the EADTU

home page. The mission statement of the EADTU is "to create a European Open Universtiy Network to enable access to high quality distance education for all people in Europe." The EADTU has 17 national members and provides distance education to 400,000 degree students and 250,000 vocational and continuing education students. The EADTU's (n.d.) home page leads to a page of projects undertaken. One of the most interesting is the development of what EADTU calls "EuroStudyCentres" as cited on their website:

> These centres make up a network of local and regional study centres to provide a student and customers support service in open and distance learning. They will act as gateways to the best courses throughout Europe and provide a quality assured pan European distribution network for course delivery. EuroStudyCentres can be based on existing study centres. They could be established as joint ventures with other organizations including regular EuroStudyCentres and will provide quality assured models of good practice for use by others. (p. 1)

EuroStudyCentres are an example of how distance education can be made available to those who might not ordinarily be in a position to continue their learning using a multitude of distance education applications. In the next subsection, I will examine social aspects of learning as applied in a distance education setting.

Social Aspects of Learning in a Distance Education Setting

In distance education, the physical separation between teachers and learners has implications that are in contrast with many traditional adult education practices. Educational theorists, particularly those with a radical or humanistic perspective, stress the importance of interaction among a group of students as part of the learning process. Burton (1992) states that "a basic element of andragogy is the involvement of learners in the process of planning

their own learning, with the teacher serving as a procedural guide and content resource" (p. 48). Mezirow (1991, p. 225) put forward a call for educators to assist learners to be self-guided, self-reflective, and rational, and to help establish communities of discourse where these qualities are honoured. He calls for high standards.

Nevertheless, the literature offers possibilities to meet these high standards. Murphy and Nixon (1994) present a technological vision that accommodates the social context of learning needs. They envisage a work (learning) group that has access to technology including electronic mail, and a common data base to enable document retrieval. Work stations can be open 24 hours per day (pp. 49-52).

European universities with their EuroStudyCentres offer students an opportunity to interact locally regardless of whether or not they are taking classes originating elsewhere, including in another nation.

Increased Access to Education

Educational researchers have developed a clear picture of who has access to adult education. Brookfield (1986) constructs the profile of the typical adult learner in mainstream adult education as a relatively affluent, well educated, white, middle class individual. Brookfield cites statistics that indicate how the elderly, blacks, those who failed to graduate from high school, and those with annual incomes under $10,000 are severely underrepresented. He emphasizes, "Of greatest statistical significance is the general finding that it is previous

educational attainment and participation that is the most statistically significant variable in determining future participation in formal education" (p. 5). Furthermore, he points out the relationship between low educational attainment and poverty, saying:

> Those who are poorly educated are, quite simply, apt to be poorer financially. They often belong to an ethnic minority group and are either unemployed or employed in low paying occupations. Their poor educational attainment is not a cause but a result of their poverty. (p. 6)

Burton (1992) cites a Scottish study on this topic as conducted by Iain Macpherson. Macpherson found a similar relationship between education participation and and the barriers faced by those with low income:

> He [Macpherson] investigated students from groups which had traditionally been low participants in adult education. He concluded that individual students are highly attracted to precisely those elements of provision which are so often underdeveloped in Scotland, including free, small, locally based classes; flexible attendance patterns; childcare provision; cooperative and discussion based learning methods; the breaking down of traditional tutor/student roles. (p.103)

Distance education offers the possibility to address many of these learning challenges. Our study circle clearly represents a professional and successful group of individuals. However, it might be interesting to examine how professional associations recruit and attract members of diverse ethnic groups; and once recruited what supports are in place to encourage participation in professional development.

The Quality of Distance Education

The cost of distance education offered through technology and other means varies dramatically. Brookfield (1986) reports on the growing role of the private sector in the delivery of education. He reports on four institutions in Boston--a

hospital, a computer manufacturer, a consulting firm, and a banking institution--which have been authorized by the state to grant associate, baccalaureate, and master's degrees. As well, Brookfield reports that corporate giants such as Xerox, IBM, American Telephone (AT&T), and McDonald's have established their own substantial training campuses.

Little has been written about mechanisms to control the quality of distance education offered. "Buyer beware" has been the attitude of the adult education enterprise through its brief history. McCullough and McCullough (1994) encourage educators to ensure that ethical practices are operating in the field, rather than unscrupulous ones. Students attending local institutions are protected by local regulations, but what protections might there be for a South African student linked to an Oregon distance education school if he or she had paid high tuition fees and not been satisfied? Or, if the ultimate degree proves to be of little value?

How can organizations effectively meet the challenge of providing quality education while addressing such issues as cost and logistics when establishing distance learning environments? Hayduk (1994) discusses niche markets for distance education. He illustrates this with the example of small sawmill companies that are required to provide a specialized safety course to a few students at a time. The use of a distance education format can provide these professional development courses to a few students and still be cost effective. In order to assist organizations with investigating new opportunities, Hayduk provides an assessment process that one might use when trying to establish

niche markets. He offers six fundamental criteria to help asses whether the market will be served. His criteria is based on such components as the separation of teachers and learners in space or time; whether the course emanates from an institution rather than an individual instructor; and whether instruction proposed in the initiative is the result of an industrialised process (p. 48).

Collis (1993) provides insight into the motivation for someone to pursue distance learning: The most fundamental motivation for distance education is geography--it allows access. However, the geographic pirnciple has been expanded to include other motivations such as time, tailoring, and flexibility to this first principle. Thus, many are susceptible to low quality programs and "buyer beware" often is not enough.

Attitudes Towards Distance Education by Professional Educators

Distance education is not held in high regard by many educators and educational institutions, yet at the same time its development threatens them. Kirby (1993) discusses issues facing Canadian universities and distance education as follows:

> It is probably fair to comment that in most dual-mode institutions distance education is seen as a somewhat lesser form of instruction. Although it may not be openly articulated, there is little doubt that in most Canadian universities the ideal teaching model is that of a small class, 20 or so in size, taught in a face-to face situation. The essential feature of this model, to my mind, is the potential for critical interaction between professor and students as well as among the students themselves. . . .The result is that distance education is sometimes marginalized by the attitudes of faculty members and departments if not by administrative action. (pp. 69-70)

In his discussion of the current situation of distance education in Canadian universities, Kirby portrays two opposing forces: the traditional classroom setting, and distance education. Distance education, he says, is, "improving its capabilities and broadening the application of its expertise" (p. 71). Another factor that may affect the future of distance education is the possibility that it may threaten the security of teachers. This view--either real or perceived--may impact the development of distance education on university campuses and colleges. In fact, Rumble (1986) maintains that non-hierarchical organizations may have a better chance at delivery of distance education. He provides the example of the successful introduction of study clubs in Antigonish, Nova Scotia during the 1920s and 1930s which egnaged adults in an educational program linked to social action (p. 34).

A prime example of how this discordance can play out occurred in 1997. Noble (1997) recounts the strike at York University:

> This past spring in Toronto, meanwhile, the full-time faculty of York University, Canada's third largest, ended an historic two-month strike having secured for the first time anywhere formal contractual protection against precisely the kind of administrative action being taken by UCLA. The unprecedented faculty job action, the longest university strike in English Canadian history, was taken partly in response to unilateral administrative initiatives in the implementation of instructional technology, the most egregious example of which was an official solicitation to private corporations inviting them to permanently place their logo on a university online course in return for a $10,000 contribution to courseware development. (p. 1)

Although the issues of York University involved external funders, one can see what the future might hold for other heirarchical institutions.

Evans and Nation (1989) raise other issues that may create threats to traditional education: student alienation, design challenges, course delivery, and dealing with heirarchical institutions. Gibson (1992) also examines the changing responsibilities of learners, educators, and the institutions at the end of the 20th century. Institutions and learners have new roles and responsibilities. Today, adding technology to the usual triad of teacher, learner, and content brings changes in responsibilities. Learners have to take more responsibility for their own learning. Teachers have to make changes such as sharing not only planning but teaching as well. Institutions have to address issues such as certification and credit transfer. These are new challenges and can be seen as threats.

As Yeaman (1994) notes, however, educators can make the mistake of confusing information technology for education technology (p. 18). Brookfield (1986) warns further that:

> In adult education, however, we seem currently in danger of becoming preoccupied with refining techniques to the exclusion of any consideration of the rationale underlying those techniques. We are philosophically numb, concerned with the design of ever more sophisticated needs assessment techniques, program planning models, and evaluative procedures. It seems not to have occurred to us that the perfection of technique can only be meaningful when placed within a context of some fundamental human or social purpose. Technique is, after all, only a means to broader ends. When technique is worshipped to the exclusion of human or social purposes it is meant to serve, then it is easy for us to become dazzled by the convolutions of the latest shaman of procedure and by the pronouncements of those who flaunt commonsense ideas regarding teaching and learning under the guise of presenting a revolutionary paradigm of practice. (p. 289)

Both educators and learners will have increasing responsibility to identify and pursue appropriate vehicles and venues for learning in the 21st century. Distance education is one tool which can be pursued in this regard. As Houle (1980) suggests, new technology will play an increasing role in education and distance education in a rapidly changing world.

Continuing Professional Education and Distance Learning

Baskett and Marsick (1992) conducted research on continuing professional education (CPE). They examined a range of professions, including architecture and medicine, and a range of educational formats from formal to informal. Their research reports that professionals engaged in continuing professional education are more likely to use more self-directed and self-planned learning rather than formally arranged programs (p. 9). A self-planned and self-directed approach is therefore conducive to the participation in a study circle. This sense of self-direction contributes to Hopey and Ginsburg's (1996) six assumptions from which educators can develop a model of distance learning:

> Traditional classroom-based models of distance education will be enhanced not replaced by new technologies. Self-authoring of learning activities will be commonplace. Instructors will become facilitators of learning not transmitters of knowledge. The future of learning will be about connecting learning to the world of work and home. Collaborative learning will be stressed. Staff development and teacher training will need to be continuous and ongoing. (p. 23)

Hopey and Ginsburg's theories can be transferred to all adult learners, including those engaged in continuing professional education. The move to self-authoring, the progress of instructors to facilitators, and the need for

collaborative learning support the tremendous possibilities for distance education.

Dubois (1996) calls for a paradigm shift in the 21st century that "defines learning as a 'classroom process,' . . .to an environment defined by 'learner-centered' processes and shaped by telecommunications networks with universal access to subject content material, learner support services and technology-literate resource personnel" (p. 20). Clearly, adult learners and professionals will be calling for new initiatives; Dubois outlines these initiatives as a paradigm shift:

> The paradigm shift will also require an increased emphasis on customer service and value-added benefits as more working adult learners or sponsoring employers exercise their consumer rights and select from a wide range of educational providers whose programs and services can, and possibly will, transcend geographic boundaries, and be time--and place--independent, as well as responsive to perceived education or training needs. (pp. 20-21)

CPE learners, who are also skilled consumers, will be forcing changes and calling for technology which will address specific needs and desires. If Dubois is correct in his premise, Canadian society can anticipate an explosion of new technological approaches to learning among a more consumer-oriented and savvy workforce.

Questions Extracted From the Literature That Framed my Study

The literature challenged me in planning a study circle as a support to distance education. Some questions to be further discussed include the following: Will, or should, CPE learners demand that learning meet their needs? Will a study circle group demonstrate or encourage this type of

control? Will CPE learners have a more positive learning experience when they create and build their own learning experience? Can CPE learners, through technology such as the Internet, transfer their learning from work to home and back again?

CHAPTER 3

THE STUDY CIRCLE IN THE CONTINUING PROFESSIONAL EDUCATION OF FUNDRAISERS

In this chapter I describe how a group of professional fundraisers established a study circle in January 1998 to help them in their efforts to pass the Certificate in Fund Raising Executive (CFRE) accreditation exam. The National Society of Fund raising Executives' (NSFRE) Vancouver chapter authorized the study circle in order to assist NSFRE Vancouver chapter members to study for and pass the certification examination. The study circle participants, through the study circle experience, developed a method of program delivery within the accepted parameters of a distance education framework. Through its self-study manual, NSFRE provided the pre-recorded, packaged learning materials, and the study circle provided an alternative model for teaching. We were all actively engaged as both learners and instructors. The study circle presented a unique opportunity for our preparing for the NSFRE certification exam because there was no specific teacher. The materials provided by the NSFRE are designed for individuals to study on their own, at a distance. Our chapter decided to study at a distance (at home), and enhance our learning and review process within the study circle. The NSFRE clearly directed our learning. We had definite areas that needed to be covered and we had to acquire specific knowledge in order to meet the challenges of the exam. For our group, the technical medium was comprised of the printed word. In this chapter I

describe the development of the study circle, the planning process, and the methodology we used. I analyze these and give my reflections on the outcomes.

The Development of a Study Circle

In this section I provide an overview of how I chose this particular project. I include logistical components such as the group composition, resources, timetable, history of the examination, and the physical environment.

Choosing a Project

I conducted my initial literature review for the master's program in the area of distance education. I was interested in determining how a study circle could enhance a distance education program. I anticipated that an evaluation of this learning experience would be a critical part of my analysis. Concurrently, members of my local NSFRE chapter decided to embark on a learning project to prepare for a professional certification examination--the Certificate for Fund Raising Executives. A group of us decided to control our own learning and created a study circle to review the NSFRE materials. As we discussed how we would approach this new learning challenge, I, along with my colleagues, helped to provide a framework for the design of the study circle and provided some guidance for the development of our model. This learning project provided me with the opportunity to examine how to effectively incorporate a study circle into a distance education learning experience.

A group of eager learners, we banded together in January 1998. The target examination date was scheduled for November 1998. Applications to write the examination were required 60 days in advance. There are three steps to CFRE certification: (a) preparation and submission of a completed application by the candidate; (b) review of the candidate's professional practice as put forth in the

written application to the CFRE Professional Certification Board and staff; and (c) examination of the candidate's knowledge of fund-raising principles, techniques, and practice through a written, multiple choice examination.
Candidates are given 4 hours to write the examination. Applicants for the exam must have 5 years experience in fund raising.

Nature of the Certification Examination

The National Society of Fund Raising Executives is headquartered in Alexandria, Virginia. Chapters in major Canadian cities participate actively in the professionalization of the fund raising sector. The NSFRE administers the exams at various locations within North America throughout the year. The NSFRE Professional Credentials Committee drafted a statement about the relationship of their Survey Course to the certification examination which reads as follows: "The purpose of the Survey Course is to provide an overview of skills, techniques, and program components based on fund raising experience at the five-year level. It is not intended to be a tutorial review for the Certified Fund Raising Executive Examination" (p. 1).

The Survey Course credits various contributors who represent a very strong American perspective. In fact, I could not identify Canadian representatives on any of the contributing committees and groups. This proved to be a problem of content and practice for us and recommendations to his effect are provided in chapter 4.

The application form includes four categories: education, professional practice, performance, and service. There are minimum points required in each

category. For example, the performance category requires points for performance in three broad areas: for actual dollars raised, for communications programs, and for management duties. Initial certification candidates a re allowed to report *only* those activities during the past 5 years. Subcategories under performance include: actual dollars raised through annual capital campaigns; capital/major gift and endowment programs; benefits and special events; corporation, foundation and government grants; and planned giving and estate planning. Other subcategories represent additional performance in communications and management practice. In the event that an applicant's position at an organization does not lend itself to raising the amount of actual dollars needed to satisfy the requirements of the category, the participant is invited to include an addendum with a narrative that details accomplish ments. The subcategories covering marketing, communications and management practice require additional documentation. In the case of management practice, the applicant submits additional documentation on program, financial and institutional management. In each of these three areas, an applicant can receive five points per achievement.

Study Circle Composition

The study circle comprised individuals from the hospital and health sectors, as well as social service and education sectors. I joined the group with 4 years experience in the fund raising field and, at the time, I was working in the education sector. Although I had only 4 years of professional fund raising experience, I had achieved considerable fund raising success in community

events, and over the years, had volunteered in a variety of organizations. There were eight women and three men in the group. Many of us had crossed paths or worked together on other projects. Most of us had, on average, 5 to 8 years in the development field so we were relatively seasoned, but still at the mid-management level. The 11 of us decided to meet to see how we might best approach the challenge of the certification exam.

As fundraisers, we worked with the public and volunteers on a regular basis. We had good skills in chairing meetings and facilitating group process. We were also skilled at ensuring that decisions are recorded--an important element in keeping us on track. Our experience certainly provided us with specific skills to work in a group environment. We were at different levels in our fundraising careers. But the types of organizations we came from seemed to have provided us with different skill sets--a fact that helped us develop complementary skills for our group process. For example, education institutions usually have a very sophisticated fund raising system while social service fundraisers serve a very different clientele with a range of systems. Each member of the group brought different experiences reflecting the diversity of the organizations he or she represented. We naturally turned to the more senior development professionals for information and expertise. And, indeed, they provided considerable advice.

Our major resource was the *Self-Study Manual: Survey Course on Fund Raising.* This is the requisite document for the examination. Included in our discussions were materials that members of the group brought to our attention;

or the reading list recommended by the NSFRE. However, there were two different versions of the manual and the group was disadvantaged in that we did not all have the same resource. This caused confusion for us as we had dissimilar chapter content and we had to continuously review all materials to ensure all group members had accurate content material.

Planning the Study Circle

This section will review the complexities of the exam application process. In addition, I will provide background information on the first meeting of the group and how we initially planned our learning experience as well as choosing where we would meet and how and why we made such decisions.

The First Meeting

How did this particular group of 11 members get together? One of the women in the group, the founder, worked in the social service sector. She was particularly keen to organize some kind of learning plan to help us get through the exam. We had a network of other colleagues who had shared a similar desire and, through word of mouth, we managed to pull together a group of dedicated learners. The local chapter of NSFRE was aware of our involvement and approved of our initiative.

The founder called everyone by telephone and took the initiative to get us together. At the first meeting, the full group participated in deciding on a meeting day. The decision to meet on Monday evenings, once per month, was logistical.

This night and time worked best for all of us. We decided that a full month to study the material on our own at home provided enough time to adequately digest the written material and prepare for the meetings.

It was during this initial meeting that I began to establish a way in which I could become more actively involved for the master's program. My literature review had convinced me that learning is a social experience and, although technology and the printed medium offer great opportunities, people learn best from and with other people.

The first meeting was the seminal meeting where we discussed and approved a general format for our learning. As we were working toward a democratic approach, we decided the following: each person in the group would prepare four multiple choice questions on the topic assigned for the meeting--these questions would include four possible answers which reflected the format of the CFRE examination. Each participant would bring copies of their questions for the entire group; along with an answer code.

During the first meeting, we also decided that group members would prepare a list of fundraising books and authors to distribute to the other members at the next meeting. However, we did not really do well at all in consulting the books and publications listed in the reading list. Finding the resources proved difficult; we would have to order books, which takes a while and is also very expensive.

At this first meeting (in January) the group discussed how we might organize the learning. The Self-Study Manual is divided into eight sections of course content; we organized it into eight monthly meetings as shown in Table 1.

Table 1. Organization of the Manual's Content into Monthly Sessions

Manual	***Topic***
Lesson 1	Laying the Foundation for Fund Development
Lesson 2	Defining an Integrated Development Program
Lesson 3	Case Statements
Lesson 4	Volunteers and Staff: Roles, Responsibilities, and Relationships
Lesson 5	Identifying, Involving, and Retaining Current and Prospective Donors
Lesson 6	Annual Giving and fund Raising Methods
Lesson 7	Planned Giving
Lesson 8	Capital Giving

Session	***Topic***
January 11	Study Group Planning and Organization Session
February 9	History of Philanthropy
March 9	Defining an Integrated Development Program
April 11	Making the Case; volunteers & Staff: Roles, Responsibilities, and Relationships
May 11	Identifying, Involving, and Retaining Current and Prospective Donors
June 8	Annual Giving and Fund Raising Methods
July 13	Planned Giving
August	HOLIDAY
September 14	Capital Campaign
October 13	Review
November	Exam

The first meeting reflected a keen interest on the part of the participants to organize and design our learning experience. We did a lot of planning and accomplished much during this first session.

Physical Environment

Burton (1992) and Knowles and Associates (1984) emphasize the importance of physical comforts on learning. The physical environment includes factors such as lighting, meeting time, air circulation, chair and table arrangements, provision for water, coffee and other drinks, breaks, as well as accessibility, and transportation and parking facilities.

Two members of our group who were working at a hospital, kindly arranged to host the meeting in their boardroom. We had members of the group attending from within a large metropolitan area--within a radius of 50 kilometres. The hospital is central and downtown; this facility provided an excellent location for us to converge. After considerable discussion, the group decided that this central location was accessible and met our requirements. The location remained constant and our host colleagues created a very friendly environment for us to meet.

The boardroom had a coffee maker and windows that provided natural light and fresh air. Our sessions began at 5:00 p.m. and lasted 2 hours. Thus, fresh air was an issue for us all, as we needed to stay awake and alert. All members of the group appreciated the hospitality, and when arriving, would exclaim, "Just what I need, a fresh cup of coffee to help keep me awake"; or, "I was so thirsty, the water is a great idea." In addition, individuals began bringing little snacks such as homemade cookies or muffins. As well, various receptions were held at the hospital and our colleagues would be sure to bring any leftover sandwiches

to the boardroom for our meeting. These were greeted with great enthusiasm such as "Great, I was starving" or, "Wow, good food tonight."

My Leadership Role

At the second meeting, I asked for the group's permission to use our learning process for my master's program at St. Francis Xavier University. They agreed and I was allotted time at the end of the meetings for discussion. I provided them with some background information on study circles, but until that time, we just called ourselves a study group. I utilized this time slot for the first couple of meetings. I provided a questionnaire for one of the meetings and asked for feedback. I also encouraged general discussion for feedback at the end of the third meeting. However, the group focused so intently on timing and wanted to finish the bulk of our work as quickly as possible, that my request for information/dialogue at the end became more of a hindrance than a help. As a group, we dealt effectively with the changes in the process and this final 5 or 10 minutes did not yield anything new or helpful. Members were anxious to depart after working hard for 2 hours at the end of a busy day at the office, so I decided it was best to not force my requests for additional input from the group or to insist upon a discussion of the study circle process. Instead I chose to evaluate the learning process by observation.

However, it was interesting that, on occasion during our meetings, a member would say "Hey, you're the education expert, how shall we proceed with this?"

My response was that we were designing our program together as we went along and I was only one voice in the group! However, they did look to me for leadership in the area of adult education, if not in fund raising.

Refining the Methodology

In this section I review how the participants strove to be as democratic as possible. I also describe how I personally coped with an unanticipated change in my status in the group and the flexibility the participants demonstrated when faced with challenges including the inconsistency of the two study guides.

Refining the Process To Cover the Content

The critical planning phase began during our second and subsequent meetings. We began to refine and re-define the process we were using in order to tailor it to our needs of mastering the content in the self-study course. We realized the limitations and opportunities of our format and undertook logistical and practical steps to address these limitations. In addition, we realized quickly that we needed to support and encourage full participation.

As the meetings evolved, we became more sophisticated in running the sessions. By the third meeting, we had established timed items for the agenda. By April, we were even more organized. Previously, all members reviewed the lesson and created questions; we now began to divide the lesson into equal parts and assign each member a specific section. This change alleviated our concern that perhaps we were not covering all the material.

By more carefully and methodically approaching the material to be covered we each took ownership of a particular area. Classmates would ask questions

and, in anticipation of these questions, we assumed a greater responsibility for in-depth preparation. As we reviewed the material, if we came upon a question or theory which we did not understand, we would turn to the individual responsible for that particular area and say: "OK, expert, what do you think about this" or, "You did the readings on this, what is your opinion?"

We were now covering the material more efficiently, but this planning phase took us 4 months to work through. We were quite patient with the process and we realized as we proceeded that the process was helping us develop a more streamlined and effective learning program.

As a group, we continued to refine the learning experience for ourselves--in accordance with our primary objective of acquiring knowledge outlined in the materials. Leadership arose from within the group and, in March, a member of the group (our most senior fund raiser) on his own initiative provided a questionnaire on specific tax issues. This proved to be very helpful.

Democracy and Social Learning in the Study Circle

The group was very committed to establishing a democratic process for involvement. It was important to us that no one in particular was called upon to share too great a load; accordingly, we assigned a facilitator and a recorder for each of the meetings. The responsibility of the facilitator was to run the meeting; the recorder was responsible for taking notes of the topics discussed and preparing and distributing notes for the next meeting. We then set up a rotating schedule for facilitator and recorder.

It was interesting to see how we developed a network throughout our 11 months together. We were very supportive and encouraged each other to attend. We phoned and sent e-mail reminders of meetings. The person assigned to be the facilitator was responsible for contacting everyone prior to the meeting and confirming their attendance. We formed long-lasting relationships and, I believe, strengthened our professional attitudes and capabilities through this process.

There were many behind-the-scene communications. These included telephone calls and e-mails of support, encouragement, and quests for information. Through these in-between communications, we seemed to band together in informal groupings. For example, I communicated with my colleagues in the education sector and others with whom I had a professional relationship. I am not sure how other informal groups were formed, but further analysis of this grouping could provide interesting insight into group dynamics and I address this point again in the recommendations section in chapter 4.

The Self-Study Guide

As mentioned, we were working with two different NSFRE self-study guides. This is something we should have recognized and examined in greater detail prior to embarking on our learning experience. As we went along, it became clear that the lessons were not comparable; we even had two different labels: one guide was set up using modules; the other was set up using lessons. The modules and lessons were not the same length, and they each had different subsections. We had to photocopy and compare information, which proved to be quite a task. It took up time and was very confusing. One manual was easier to

follow, but, on the whole, each covered the same information, just with a different format. This content disorder was challenging as we had to have a double list of the content and then establish which chapters from each manual we would be studying and in what order. The material was rather boring, and presented in the manual in a rote and uninteresting manner, but we managed to create a synergy around our learning that kept us coming back each month. Our discussions were stimulating.

The materials are produced in the United States and we took issue with the American slant. This slant puts the Canadian candidates at a disadvantage because we have different tax laws and different terminology. To make up for this problem, we had to supplement our learning with alternative Canadian readings and specific tax documents. Without the expertise of our senior development professionals, we might not have known what other resources to use. This is a cautionary note for other groups, in similar certification programs, and I address it again in chapter 4.

My Changing Role in the Certification Process

The application for taking the exam was completed in September, 2 months before the exam. The process of filling out the CFRE application took me almost a full day. The application process occurred 8 months into the study circle process. During the application process, many of my colleagues in the study group were in active communication. We e-mailed and phoned each other with questions and suggestions on what to include in the application form. We had a number of questions around the application, such as "How do I fill this out?" and

"What are they looking for?" And there was a deadline! As members of the group communicated with each other, I discovered that two colleagues whom I thought would be naturals to write the exam had not submitted their applications. I encouraged these colleagues to submit applications and proceed with the exam.

I had been somewhat nervous about my application because, at that time, I did not have the requisite 5 years of experience in the fundraising sector. However, the application process provided a possible way around this as the reviewers had indicated *pro bono* activity would be considered. I hoped this would fulfill the eligibility requirements but it did not. My concurrent *pro bono* fundraising activity was not accepted; my exam application was rejected. I can apply to write the exam in the future, but am unsure when as I will have to go through the whole review process again. I will determine whether I am again prepared to study and prepare myself for the exam. Several of my colleagues were disappointed for me, but were well aware of the exact requirements of the examination.

I began my involvement with the group as a colleague and co-learner. When I discovered in the fall that I was not accepted to write the exam, my role became that of a mentor. I was the only exam applicant in our study circle to be denied the opportunity to write the exam. Although I was disappointed, I valued my time spent with the group and the knowledge I had acquired.

Following this surprise rejection, I turned my attention to supporting those who were writing. For example, I contacted two members of the group who had not submitted their applications on time and suggested they send them in late

with great apologies. One individual chose not to follow my advice and decided to drop the application process, but the other colleague did follow my advice and successfully completed the exam. She indicated that "I would never have gone through this without your support and encouragement." I clearly saw how much effort had gone into this program and I felt a responsibility to encourage and support my colleagues with their applications. Also, as I had personally invested much time and energy in supporting and helping to develop this learning program, I felt I had a responsibility to fulfill my obligations to the group.

The exam was held in November 1988, and nine members of our group wrote the exam. Although the study circle group did not get together again after the exam, I spoke personally with at least five participants who advised me that they successfully passed the exam. I was happy for my colleagues and vicariously enjoyed their success.

One of my colleagues called me when she received her mark and did not announce her identity, just shrieked into the phone "I passed!" I, of course, knew who it was and was very happy for her. She is a seasoned fund raiser and will be very proud to bear the letters, CFRE, behind her name on her business card.

Another one of my colleagues applied to write the exam, but was simply too frazzled to write it when the time came and withdrew from the process. I felt quite bad for her, but it had been an extremely busy time at work for her and she simply did not feel that she had enough time to commit to the final studying necessary to be prepared.

My Analysis of the Study Circle Model at Work

In this section, I review how the group implemented the study circle model, including the emergence of leadership, the feedback process, and the sharing of information and news.

After going through the first round of multiple choice questions, we began to realize the limitations and opportunities of the multiple-choice format. The first go-around seemed rather onerous. We were submerged in paper and we had all read, studied, and prepared questions on the entire lesson. Our concerns focused on whether we had adequately covered all the material. We were worried that we might miss some important areas because we were covering too much material at once.

During the second meeting, after I introduced my request to use the group for an evaluation of the efficacy of the study circle, we realized that we needed to support and encourage full participation. The first meeting indicated that not everyone was on top of things. We therefore decided that each person must submit his or her questions. If unable to attend, questions had to be faxed to the facilitator for distribution at the meeting. We managed to seize control of this issue early in the learning process as we realized the necessity for all to carry their weight and make an equal contribution. A member stated our system worked well because "I feel like I have a responsibility."

Attendance was quite good. We developed a rather tight system and, about the mid-point between meetings, the facilitator would normally call all to ensure their attendance. The evaluative system of feedback we developed in our

learning process is consistent with Napier and Gershenfeld's (1999) emphasis on support. Through discussion, group members determined that a friendly reminder is a professional and appropriate task. After the second meeting, facilitators were very good at getting the agenda out early and contacting members to confirm their attendance. If unable to attend, the facilitator would usually initiate a prompt to have documents sent ahead to be included in the package for the monthly meeting. As one member said, this created a "sense of commitment and all of us will succeed together."

As the meetings evolved, we became more sophisticated in running the sessions. During the second meeting, we established timed items for the agenda. Again, this decision was made because of a feedback process. The evening did not seem to move along very quickly--we were bogged down with a couple of issues and discussion was lengthy and circuitous. We were tired. At that point, a member of the group suggested we allot a specific time for each area to be covered. This suggestion was immediately accepted by the group. Here was a sort of collective verbalization of what we were all thinking. We seemed to reach the same conclusion at the same time. There was a collective sense of relief. Again, it was one of those situations where we wondered what had we been thinking up to now. This time allotment was so simple, yet it had escaped us until we were floundering.

The Emergence of Leadership

One member in particular played a significant role; his experience and expertise were invaluable to the group. It was through his leadership that we began to develop a more sophisticated approach to our studying and learning. The group immediately recognized his expertise and welcomed his suggestions. He provided suggestions in a non-threatening, inclusive way, and his suggestions were enthusiastically welcomed. It is interesting to note that we would seek his advice on some of the larger ethical issues as he had so much knowledge and experience.

When the group first formed, even though we had previously attended conferences together, we did not really know each other well, but over time, we settled into different roles. Each of us assumed specific roles within the group. As in every group, there were individuals with a natural tendency and often ability to run things; others were less assertive. When I facilitated, I was often protective of those who participated less in the sharing and would specifically ask questions to draw them out, such as "How has your month at work been?" or, "How did you make out with your $1 million proposal?" or, "How did your gala go?"

Our little study circle, like every other group, had individuals who liked to take charge. We managed to keep things on track and no major issues emerged in this area. Without having anyone in particular as the leader, this left us more vulnerable to the whim of the current facilitator. If we did get off track, or off agenda, members of the group would usually try to steer the agenda back to the facilitator by turning to the facilitator and saying such things as, "What's next on

the agenda"; or "I would appreciate if we could move on to the next agenda item as I really need to be out of here early tonight." These tactics worked without making the facilitator look foolish, and without being overly rude or hostile to the "chatter." Our experience and professional activities provided most of us with skills to keep things on track, and we simply applied these skills to our group interaction.

A major "aha" moment occurred during our fifth meeting. We decided that we needed to review each lesson and have a written test the following month. This suggestion was introduced by our most seasoned colleague. He led the group in this process and simply took the initiative to prepare a review test for us. This test comprised questions supplied by the group. He simply created a review of our questions--in particular, he brought in the questions we had the most difficulty with. His action was not as a result of a feedback process or discussion. Rather, he emerged as a natural leader within the group as he introduced a more sophisticated learning approach. The group's respect for him grew as we considered his actions were clearly very professional.

This development represented another enhancement for our learning experience. We assigned the facilitator to distribute the question assignments *and* to prepare a review of the previous lesson. One of my colleagues commented to me as we were walking to our cars after this meeting: "Boy, you can really see the difference 15 years in the business makes, he just knows what needs to be done."

Another rather brilliant idea was to put our name on our question sheets. Up until this time, we had a rather complicated system of numbering the question sheets, but a name on the sheet made this a much easier process. This idea came from an individual who as also one of the hosts at the hospital. He just smiled and said, "I think it would help if we identified who has brought each sheet." We all breathed a collective groan as we recognized how much easier this would make our task.

As mentioned earlier, in March, a member of the group, (the senior fundraiser mentioned above) provided a questionnaire on specific tax issues on his own initiative. The group had identified this as a particular area requiring additional knowledge, and he prepared a list of questions for us. The group appreciated his efforts. We appreciated his input and the group came to rely on his knowledge in a number of areas. His lengthy career in fund raising brought clarity and significant expertise to the group.

Changes Developed through the Feedback Process

By the third meeting, the designated facilitator was sending the members an agenda in advance with the topics of discussion and a time slot for each topic. This helped create a more seamless meeting and, in fact, it seemed to shorten the meetings.

By the study circle session in April, we were becoming much more organized. Previously, all members had reviewed the lesson and created questions; we now began to divide the lesson into equal parts and to assign

each member a specific section. This allocation addressed our concern that perhaps we were not covering all the material. Upon reflection, this decision to allocate specific sections developed through a feedback process. During our meeting time, participants shared ideas and suggestions for a smoother process. All ideas were considered and suggestions always seemed so logical that we readily accepted them. As a professional group, we were familiar with dealing with large complex issues and finding processes to meet needs. These skills were clearly to our advantage.

For example, when covering the lesson pertaining to volunteers, we divided the lesson into eight components: (a) volunteers: reasons they volunteer, governance roles, development roles; (b) director of development: responsibilities, knowledge areas, skills; (c) staff expectations of volunteers and volunteer expectations of staff; (d) volunteers: training, job descriptions, performance evaluations; (e) identifying and recruiting fund raising volunteers: why volunteers lose interest; (f) board members; (g) ethics; and (h) role of the chief executive officer. Each of the components was assigned to a specific individual. We were now covering the material more efficiently, but this took us 4 months to work through. We were quite patient with the process and realized as we proceeded that the process was helping us to develop a more streamlined and effective learning program.

Punctuality

The group became very conscious of our time, and starting on time was a priority. We tended to become quite unsympathetic to latecomers. We started promptly at 5:00 p.m. whether everyone was present or not. We collectively agreed at the second meeting that we would not wait but go ahead without those not in attendance. Our founder took the lead on this and the group readily accepted her suggestion. I thought this reflected a certain level of professionalism in the learning experience. We refrained from comments like, "Well, she is always late," but focused on a more proactive approach. Comments such as, "Has anyone heard from X, I know she had a big donor meeting today – do we know if she is coming?" or "I talked to Y and she said she is coming but will be a few minutes late" became commonplace.

The Sharing of Information and News

From the first meeting, it was obvious that we needed to have a committed time period for sharing news and information. During the life of our study circle, two individuals received new jobs; others took exciting vacations. The social aspect had a significant impact on our relationships. Fund raisers typically have rather outgoing personalities. Upon reflection, perhaps other groups would not bond as well as we did, a point raised in the recommendations section in chapter 4.

Interaction Leads to New Approaches

Through writing our questions each week, we were able to identify areas where we were weak. The group then accepted responsibility as a whole to

discuss these areas of weakness. Again, we were consistently challenged with the "American" approach evident in our materials. However, through discussion, we were forced to examine issues such as Canadian tax regulations in greater detail. This default approach helped to increase our learning.

We were continually challenged by the question of ethics. Any professional group that is committed to handling large amounts of funds is prey to potential challenges to its accountability. We, as a group, were well aware of some of the horror stories of fund raising gone terribly wrong. None of us wants to be in that situation and, consequently, we have a very strict code of ethics to adhere to. The study guide focused considerable discussion on ethics. For our learning group, the discussion centered on how to translate ethics into everyday action. The study group allowed us the opportunity to discuss our everyday challenges and to seek the advice of the group on how to handle these challenges. For example, there was an ongoing discussion whether we remunerate fund raising consultants through percentage of funds raised or straight fees. The current NSFRE code decries percentage payment but, on occasion this could be a very appropriate payment option. However, as members of NSFRE we had to adhere to the NSFRE code of ethics; we could not violate this rule.

Through discussion with our peers, we learned new and alternative ways to approach a problem. Solid examples provided by peers offered great potential for improved performance back in the office on a day-to-day basis. What a strong professional support group we turned out to be for one another--the sharing of information based on practical applications for real-life situations greatly

enhanced our learning. We discussed issues such as gift acceptance policies; a major ethical dilemma for many fundraisers is when is a gift not a gift. For example, Revenue Canada has very specific regulations for the acceptance of charitable gifts. Fund raisers must ensure that when accepting a charitable gift it meets all tax criteria, but donors sometimes want "strings" attached and we must determine the efficacy of these requests. We discussed how we can lose charitable status for our organizations if we do not adhere to the letter of the law, but there are always external pressures from donors that can cause us considerable concern.

As we discussed the questions, we also learned how to answer multiple choice questions more effectively. This was not as easy as it sounds; many of us feared the question format above all else. It had been years since many of us had been subjected to multiple-choice exam questions. One group member suggested we might be faced with "trick questions"; another had read that, when in doubt, "choose 'c'."

However, we all had concerns about the exam itself. To answer our questions, we sought the advice of a seasoned fundraising practitioner who had taken and successfully passed the exam. As a requirement of the exam process, when you write the exam, you agree to treat the exam as confidential and not to discuss the questions with anyone. However, successful CFRE professionals can certainly suggest major areas of concentration and what general areas seem to be considered essential. Unfortunately, I was travelling on business during this person's visit with our group. However, the feedback I received was that his

presentation did not provide new information. When we planned this session, we hoped that we might hear "It's a piece of cake--no worries" or, "You can expect a heavy concentration in the areas of X, Y and Z." So, we were back to trying to determine for ourselves how to approach reviewing all the material in the study guide.

Outcomes and Reflections

My evaluation of this project used a qualitative approach through participant observation, discussion after meetings, and informal interviews. This was not as thorough an evaluation as I could have done, or at least would now undertake, after the completion of the program! I would have had a more formal approach to the evaluation process including more written surveys, follow-up telephone calls, or one-on-one interviews--an area I comment on in the recommendations section in chapter 4.

I think it would also have been useful to consult more with officials within the NSFRE and perhaps seek the advice of the exam designers in the United States. As a group, or as a local chapter, I think we could have done more groundwork. In fact, it never occurred to me to contact someone in another NSFRE chapter or the U.S. to see if there was a best practice model for reviewing the exam material. This, too, is raised in the recommendations section in chapter 4.

I agree with Percival (1993) that criteria need to be established, and program strengths and weaknesses need to be identified in order to implement a successful evaluation process. I should have undertaken a more thorough job of

setting up the criteria for evaluation at the beginning of the learning experience. Percival (1993) provides a model for evaluation:

> Identify purpose of the evaluation, decide who will participate, build a design for the evaluation, set time parameters, secure adequate resources, collect data, analyze data, make evaluation decisions, interface evaluative decisions and goals, and refine goals (p. 136).

However, although my group was very willing to assist me, as a colleague in the advancement of my personal goals, they did have a limit to the hours in their day and wanted to get home to their families and activities.

For my learning experience, I should have given as much thought to the design of the evaluation process as to the methodology and outcomes for our learning experience, as the former would have strengthened the latter.

In this section, I relate some of my reflections on the learning experience. Learning in isolation can be a significant factor in any distance education experience. We were, in fact, a linked group of middle managers who used regular dialogue during the monthly study circle group sessions and overlapping channels of communications through our interim phone calls, e-mails, faxes and individual meetings.

Our study circle was an empowering experience. We had the distinct luxury of designing our own learning experience to meet our individual and collective needs. We had no one else to report to except ourselves and had no one to answer to but ourselves. Our group clearly fostered a spirit of mutuality; and we were certainly joint inquirers as we had no specific leader.

In addition, we were all equally invited to participate in the decision-making. Our group actively encouraged mutual respect. Our trust grew as we learned to

depend on each other. We accomplished this through several sessions of meeting deadlines: facilitators and recorders each met their responsibilities; monthly questions were delivered even if the author was out of town or absent because of business or personal commitments; and group members called the facilitator to confirm their attendance. If members had previous bad learning experiences, fear, or uncertainty, they were certainly willing to overcome such previous baggage to attempt to meet with this group. Attendance indicated that our group provided enough support or they would not have continued their participation.

Although we all conducted our initial study "at a distance," we enhanced and enlivened our individual learning during our monthly meetings. Our discussions were lively and provocative. We had comments such as, "Whoa, wait a minute, I don't think that would be a good idea" or, "My experience has taught me that our 'sociability' helped to reinforce our learning."

Ours was a very self-directed group and we certainly were reflecting on our learning as we made changes to our methodology throughout the months. We demonstrated through fine-tuning that we recognized inefficiencies, made adjustments, and kept moving forward. As one of my colleagues put it, we strove to "learn as much as we could" about the assigned subject areas. Our learners took complete responsibility for their own learning, in part because of our "professionalism." The psychological climate was important as well as the physical environment, and we considered these aspects of the learning environment as we developed our own learning experience. For example, we felt

a lot of frustration around the differences of the two texts, which created a stumbling block to our learning as we struggled to grasp the importance of the various sections. We had to stop and photocopy materials during the meetings. We also had to carefully go through each set of chapters as a whole group to be sure we understood our assignments. Nevertheless, these frustrations were limited to standing over a photocopy machine trying to figure out which chapter sections matched and did not spill over into our other learning processes.

With regard to my own professional development, I learned much about how I function within a group. I gained the respect of my colleagues over the months we worked together and they saw how I would position new ideas; do follow-up phone calls; canvass for attendance; or call a colleague with encouraging words. I took my responsibility to the group seriously and did not miss a meeting, unless I was out of town.

However, it was difficult for me to properly develop the 5 or 10 minute review with the group. I felt as if I was imposing on their time by doing so. Also, our monthly meetings were very open and our frank discussions continued to move us forward so I decided that discretion was required here and not to push the issue too far. I felt I failed the group for not having this formal evaluation time as I had originally requested. Yet, I did not see any easy way to change or alter the circumstances.

In retrospect, I would be more forthcoming next time and simply ask the group if they wished to continue with the 5 to 10 minute review, thereby letting them make the decision. Perhaps my take-charge attitude, which I worked so

hard to downplay during our monthly meetings, influenced my inability to see what I should be doing to conduct a thorough evaluation. I had the plan in writing, but did not carry it through in practice. More attention to the structural relationship between the distance education component and the complementary study circle component would have provided a superior learning experience.

Many questions remain unanswered, or at the very least unchallenged. One of the germane issues is how effective this learning experience was in supporting the distance education format. Another fundamental question is whether or not this was a true study circle. I have examined various models, but this area warrants further discussion. Perhaps a new term should be coined to appropriately reflect this learning experience. These two questions challenge the concept of both distance education and study circles for me.

For example, did we design the best study circle to appropriately meet our needs? Do we need to call it something different--again, is the label "study circle" truly reflective of our experience? What other models of distance education are using this type of approach? When examining the larger picture, can organizations such as the NSFRE effectively utilize this model? Can subsequent groups of keen and experienced professionals anticipate accessing this type of a learning experience? Should this be promoted?

Another major issue is whether or not the social aspect of our meetings was critical to our learning success. Study circles should establish whether they are

providing the right environment to eliminate fear and create humanness among group members. In the next chapter, I discuss some of the issues these questions raise.

CHAPTER 4

DISCUSSION AND SUGGESTIONS FOR DEVELOPING STUDY CIRCLES

In this chapter, I discuss study circles as part of distance education based on what I learned and might do differently as a result of this study. I discuss the learning environment and how the philosophies of education apply. I also discuss why planning is important and how the transfer of learning occurs in a certification-driven study circle model. I then provide my own learning outcomes and look at the implications of this study for the adult practitioner. Finally, I suggest guidelines for professional organizations seeking to develop study circles.

Practical Application of Distance Education Theories

My study circle of professional fund raisers was a distance education program because it was a structural approach to learning whereby the teachers and the students are not involved regularly in face-to-face interactions. Consistent with Verduin and Clark's (1991) definition of distance education, my study circle fulfilled the components of an accepted distance education framework because the learners and the certifying association that produced the materials for the program were at a distance. Similarly, it fits Roantree's (1992) description of learning at a distance with the help of pre-recorded, packaged learning materials. We were provided with pre-packaged learning materials from the Virginia headquarters of the organization. We studied and learned these materials at a distance from the headquarters. At a sub-level, we also met the

requirements of distance education definitions as we met only once a month and studied and learned at a distance from each other. We did not have a specific teacher, but organized ourselves into a learning group and developed a model that worked for us.

A significant factor for our group was that the majority of our studying and learning occurred at a distance, as discussed. The study circle provided a confirmation of our acquired knowledge; the group acted as a sounding board; and the study circle afforded the opportunity to learn the appropriate approach or response to various issues through general dialogue and discussion. We brought accepted knowledge to the group and, through the group process, refined the appropriate level of understanding with regard to fundraising principles and philosophy. The study group provided an opportunity to test knowledge acquired through our readings and practical experience on the job. Sork's (1991) research reports that the key to learning rests in the learner's perception of the importance of learning to his or her work--its relevance to where the application takes place. Clearly, the study circle perceived this importance or participants would not have engaged in the learning process.

Barski-Carrow (1998) states that people learn in a participatory environment as they reflect and integrate new information. Andrews' (1992) research shows that people are discovering their own authority in study circle education programs and, in this application, demonstrate responsibility for their learning. In a study circle model, individuals ultimately control the content and discussions of the group process. In the end, our group chose a model that was a composite of

the features offered by the theoretical frameworks of study circles and the features of distance education. Our model centered on the following features: participants can learn and study effectively at a distance from a learning institution; participants can gather each month in an informal setting (study circle) to review the learning concepts; participants can reach consensus on the content and process for learning; and, participants ensure their learning is successful within the common understanding of the group. This process allowed participants to reinforce their learning within the group.

We wanted to follow the general guidelines of group size (6—12) suggested by the Study Circles Resource Centre (1998). Another important feature for the group was to ensure that all participants shared an equal workload and equal distribution of assignments. This feature of the study circle supports Caffarella's (1994) theory that adults prefer to be actively involved in the learning process; adults want to be supportive of each other. We accomplished developing an equal workload by carefully assigning facilitators, recorders, and monthly readings and question preparation. These factors acted as the framework for our model to which we made necessary, and hopefully, effective refinements. As an example of such a refinement, a participant brought a questionnaire on taxation for the group's consideration. This step went beyond Caffarella's (1994) model and was an addition to our group made possible by the support and trust we had developed. His action was unsolicited and enthusiastically welcomed by the study circle participants. This point of refinement in Caffarella's model is revisited in the recommendations section of this chapter.

Houle (1980) advises educators that flexibility will be a key to future learning success. Our study circle demonstrated flexibility in that we responded to unique challenges creatively and with good humour. For example, when faced with the knowledge that we had two different resource packages, we treated this as a speedbump along the way. We photocopied materials and this major photocopying initiative became rather comical at times, as we had mounds of paper and total chaos as we tried to disperse the materials.

My motivation for participating in the study circle was to solve the problem of achieving professional certification; but my motivation also incorporated my desire to learn and excel at what I began. This latter point supports the identificiation of my need for self-actualization. Elias and Merriam (1980) describe the goal of humanistic education as the development of the person. They theorize that individuals are open to change and continued learning and strive for self-actualization, but it also demonstrates the value and collegiality created by such a group. I could have dropped out, but I felt a responsibility to my friends and peers. This speaks to the power of such a group, I believe. This focus on the importance of interpersonal relationship and the learning process reflects my personal journey with the study group. I continued my commitment to complete the learning experience, even after I was not accepted to write the examination. I did not abandon a process which I so firmly supported and I did not abandon my peers. Had I been working in total isolation, I would have stopped working on the program when I learned that I did not qualify for the exam.

According to Houle (1980) and Kidd (1973), technology will play a significant role in the way learning is organized into the future. Similarly, Chacon (1992), and McCullough and McCullough (1994) point out that the challenges of computer-related training change the way both learners and educators behave. For example, Chacon (1992) describes how the computer extends three major processes of behaviour: information processing, interaction, and communication. McCullough and McCullough (1994) point out that technology can free educators from time and location restraints. However, this change will affect recruitment, retention of learners, curriculum, and instruction, as well as staff development and acocuntability. Muffoletto (1994) says that although education occurs in a social context, technology is grounded in both social control and system management.

In our study circle, the Internet was a key tool in our communications, especially e-mail. We conducted some searches on the internet for supporting documents, but we did not access the internet as thoroughly as we might have--it was mainly a communcations tool for us. Heinrich (1996) describes how the Internet will affect learning for distance education applications. Learners now have great access to the current discussion on the use of technology in distance education. In fact, the methodology we developed and refined has several possibilitites for incorporating a greater technology component, including putting the learning materials on a website. For example, if a certifying organization (such as NSFRE) were to put the manual on a website, this would facilitate

access to *common* materials; unfortunately, this was not the case in our project, but is noted in the recommendations section in this chapter.

Rumble (1986) advises educators that implications for a distance education learning experience include changes in the nature of the transaction between the student and the teacher. In our study circle, this was certainly the case, as we did not engage any specific teacher. Our materials were the major guide, and we relied on ourselves as joint inquiriers. For example, we had to seek out Canadian examples of tax regulations.

Burge (1993) defines distance as more than geography. She includes factors such as economic, cultural, or whatever other barriers make it difficult for people to access the education and training they want in the concept of distance. Burge emphasizes structural barriers such as timing of courses, location of classes, and lack of day care within this broad definition.
Collis (1993) suggests motivation for taking distance education includes the opportunity for time tailoring--the opportunity for students to coordinate and organize their time for their learning experience; time tailoring is not externally imposed. Our study circle worked hard to address these challenges and barriers, specifically with regard to scheduling and flexibility. For example, we made accommodations to follow the self-study guide in two formats. I personally revised my role when my application was rejected, and the group responded positively when I added mentor and supporter to my role as co-learner.

Hayduk (1994) maintains that a distance education format can be cost effective. For example, there were few costs involved in our learning experience with the exception of purchasing the manual and paying the exam fee. We arranged our meeting schedule following consultation and determined the best time to meet. These actions helped remove barriers to the learning process.

The major benefit the other participants remarked on for our study circle was that we interacted so well. Similarly, Burton (1992) emphasizes the interaction of learners in their learning process. Our study circle clearly promoted an interactive approach. By creating an equal group of partners in the learning process, participants had freedom to participate in an interactive way. For example, although the meetings were structured to accomplish specific learning goals, we provided time for questions, comments, and suggestions. Also, the freedom to share both personal and professional information supported the participants in their full participation and interaction. This interaction was built on trust and a confidence that what each person had to say was important. In Andrews' (1992) model of study circles, participants' ideas are expressed as different experiences of reality. Our study circle approached problems from different experiences since we realized that problems have more than one solution. This search for solutions, through dialogue and interaction, supports Napier and Gershenfeld's (1990) research on self-help groups. Our interactive and open approach helped our study circle participants learn new solutions to old and new problems.

The composition of our group was consistent with Brookfield's (1986) description of the typical adult learner: relatively affluent, well educated, white, middle class individual. But it is the nature of the knowledge required in this particular learning experience that created this homogeneity. The study circle comprised seasoned and employed professionals, already well entrenched in the workforce. Although not necessarily affluent, all participants were economically secure. It is interesting to note that the group was comprised of Caucasian individuals from a city which has a significant Asian population. Perhaps the Vancouver NSFRE chapter should look at recruitment efforts for fundraising professionals with an emphasis on diversity--a point raised in the recommendations section of this chapter.

Evans and Nation (1989), and Gibson (1992) look to new models of distance education learning in which learners assume more responsibility for their learning. Our study circle did take full responsibility for the learning process, and this leadership could result in a new role for the certifying institution if other circles or other learning groups organized themselves and would begin to demand more support and assistance in preparing for the examination. We did not have a problem identifying the program or the content (apart from the confusion in the manual), as this was supplied. However, we did have to deal with the methodology. We also did not advocate NSFRE should consider study circles among their various chapters. This point is raised in the recommendations section.

Although our experience was based on pre-packaged materials, rather than a computer program, Yeaman (1994) and Houle (1980) offer ideas that technology can play an increasing role in adult educators' rapidly changing world. As educators, we need to be aware of the limitations of technology, but a computer-based training program could be easily developed for the NSFRE exam preparation, as added to the recommendations section of this thesis.

Rumble (1986) suggests that isolation is the darker side of distance education, but he predicts that institution-centered distance education is likely to be replaced by "a networked organization in which a large number of linked sub groups and individuals (particularly at the middle management level) will begin to interact with each other using fluid and overlapping channels of communication" (p. 198). Our group is a step in the trend Rumble predicts.

What I Learned; What I Would Do Differently

I was impressed with the way the group, including myself, rose to the challenge of organizing and sorting out our tasks. We did not have pre-conceived notions of how we would do this; yet, every week provided us a revelation as to how we could improve the learning process or enhance it in some way.

There were disappointments along the way. For me, a low point was when I was not accepted to write the examination because I did not have the requisite number of years in the fund raising business. Although I was disappointed, none of my colleagues seemed particularly shocked at this, as we were all well advised of the requirements. Although I have the opportunity to write the exam in

the future, I would have preferred to do so with this group. The challenge for me at that point was to promote the confidence in my peers and support them as best I could. This was both a professional and ethical responsibility I had and I did try to encourage everyone as best I could. My support for others has been rewarded as I am in close contact with many of these individuals and, moreover have recently been successful in helping to place one of my colleagues in a senior management development position. This personal involvement is very rewarding to me and definitely reflects on the success of the study program– our interest in sharing and caring was a strong motivation for this group.

Personally, I continue to be amazed at the fact that a group can so capably direct their own learning to suit individual needs. The process re-confirmed for me that learning is a group and social activity, as claimed by Muffoletto (1994). I am convinced that the group as a whole would not have scored so well on the examination without the group learning process. Through my project, I confirmed what Caffarella (1994) states about adults as learners: we do indeed bring a rich a varied background to any discussion. I also support Caffarella's position on the learning process and how participants learn best. Our group clearly drew on past experience to find current solutions. We worked both independently and interdependently in a meaningful and supportive way.

Sork (1991) provides detailed analyses of learning from failures in program planning. We did not fully realize the implications of two separate study guides and this was a painful lesson, one I will apply to any future learning program. Review the materials first.

I also learned more about my own learning style. I am not a natural journal keeper, and even jotting down notes is a very challenging activity for me. However, I do enjoy process; healthy dialogue and good discussion provide a challenge and stimulation that I require. I learn and absorb information through discussion more so than through reading and writing. But this has been the case for me all my adult life, which is why I believe so strongly that learning is social. I have always been very conscious of body language and group discussion. Dialogue provides me with the optimum learning environment. Caffarella (1994) points out that participants are motivated to learn when a variety of teaching methods are used and that participants learn in interdependent and collaborative ways. I need to see and hear how people react to things--reading about it does not provide me with the same sense of immediacy and involvement.

Caffarella (1994) provides an excellent guide for planning in her book, Planning Programs for Adult Learners. Although I knew about this resource, I personally fit the description of someone who was unaware that there are planning models available for use, and who simply did not take the time to discover the necessary resources. However, I am supported by Sork (1991), and Strother and Klus (1982) who report that success often is a result of failure. I took risks by not exploring all the resources but I have learned what to do next time. This for me was an "aha" experience. My increased attention to planning and critical reflection on the planning process in my study circle will hopefully become my praxis.

Creating the Learning Environment

One of the most important aspects for the study circle was creating an appropriate learning environment--both physically and psychologically. Burton (1992) supports the importance of an environment in which adults feel accepted, respected and supported. She indicates the climate for adult learning should be one that "causes adults to feel accepted, respected, and supported; in which there exists a spirit of mutuality between teachers and students as joint inquirers; in which there is freedom of expression without fear of punishment or ridicule" (p. 46). This spirit of respect and acceptance was demonstrated specifically during our first meeting. While discussing how we would proceed, all ideas were made welcome, everyone who wanted was invited to address the group. The founder went around the table inviting all participants to provide comments and suggestions.

Napier and Gershenfeld (1999) discuss the anxiety of group members and, although this anxiety typically dissipates over the duration of the learning experience, each meeting will bring a varying level of anxiety for the members. However, by creating an informal learning situation, our study circle helped reduce the anxiety. For example, without an "expert," participants did not feel the pressure experienced in a formal classroom setting. Knowles and Associates (1984) also focus on the importance of establishing a psychological environment that conveys a sense of humanness to make learning conducive.

This sense of humanness was promoted in our circle by the actions of the group members, such as calling each other between meetings to offer encouragement and support, and sharing exciting, and not-so-exciting, news at the monthly meetings.

Nevertheless, we were not immune to Kolb's (1984) observation that adults approach learning with a sense of fear. Adults feel they have forgotten study skills. This factor was particularly applicable to our experience. Initially, members of the group were fearful of a multiple-choice exam. An essay exam, or a verbal discussion assessment would have been viewed with greater enthusiasm. As the group became more familiar with the exam material, apprehension around the multiple-choice format diminished. In fact, as the months went by, the discussion about the fear of multiple-choice questions vanished.

Ferris and Wagner (1985) identify three fundamental principles for quality circles : (a) group performance is superior to individual performance; (b) workers desire participation; and (c) participation improves productivity. Our study circle illustrated these principles. The group accomplished more working together than it could have working apart. For example, through the process of all members of the group participating, we increased productivity as not everyone had to repeat the same research. Another example of Ferris and Wagner's principles is supported by the fact that a participant voluntarily introducted an additional learning tool (the questionnaire on taxation), which clearly indicated an interest in participation.

Mager (1975) reports that people can learn anything if their lives depend on it (cited in Sork, 1991, p.67). Obviously, for our group of learners, our very lives did not depend on the success of study circle nor on passing the NSFRE exam. However, it was a strong motivator. To be accepted by our peer association as knowledgeable and experienced has merit. For some of us, an increased salary might be the outcome of successful completion of the exam. For others, it meant an opportunity to advance to a higher level position. This promise of future reward clearly enhanced the learning environment and added to the motivation of the group--collectively and individually.

We did focus on the short term, as suggested by Sork (1991) who advocates a short time line. Although we did not choose a particularly short time frame, we did have an opening and closing time for this learning experience, as Sork proposes.

What does make this study circle unique is that it truly was a one-time effort. We were not building a program to be a particular step in a learning process. This learning process had only one major objective--to pass the exam. Once this was accomplished we would not likely ever repeat the experience or band together with this group again. Sork (1991) also suggests that we should "allow for participation on setting expectations" (p. 77). This group did own their goals and expectations--it was truly our own learning experience.

Katz's (1970) theory on self-help groups states that one of the hallmarks of the beginning stage is the presence of a founder. Our study circle had a founder; our fund raising colleague initiated calls to other contacts in the local chapter

and, soon, a group was formed. The founder demonstrated charismatic and leadership qualities, as is suggested by Katz. Without her leadership and risk-taking, we may never have come together. Katz talks about a charismatic presence that serves to effectively organize a group of people and this individual clearly demonstrated this characteristic. As recommended later in this thesis, certifying organizations and other learning institutions should seek out someone with classic founder characteristics if such an individual does not come forward spontaneously. The founder acts as a strong catalyst and, indeed, the group needs an initial prompt to move forward with the learning experience. Katz continues to discuss how few rules abide, but people informally share the responsibility. In our experience, we began with a loose structure, but quickly developed a format to assist us in our learning and to coordinate the learning activities. Katz also predicted leadership would emerge and, in our case, it did. One member of the group, a seasoned fundraiser with considerable experience, assumed a leadership role in the group. He did so by initiating the chapter review questions and the taxation review. In this study circle the role of the founder decreased as the group took on more responsibility. In fact, each person came to be called on to facilitate some aspect of the learning as we implemented a democratic model.

Katz's model (cited in Napier & Gershenfeld, 1999, pp. 480-481) predicts that the final stages of the development of self-help groups include the beginnings of formal organization and the beginnings of professionalism. I did find it interesting to speculate on whether we could achieve the formal

organization and beginnings of professionalism as suggested by Katz. I speculate that if the NSFRE wished to adopt study circles as part of its program, the one we developed could be replicated in other geographical locations. Should this occur, such activity would fulfill Katz's final stage--the beginnings of professionalism which is to expand into a larger network, possibly national, of learning. However, the organization should encourage this through founders, those who are clearly commited to the learning experience, to undertake the organization of the first meeting. This leadership will be important to the success of any study circle movement for the NSFRE.

Learning Philosophies

I discussed earlier the six major philosophical trends outlined by Elias and Merriam (1980). Although not all these trends are applicable to our study circle, I discuss some of the relevant correlations here. Educational theorists, particularly those with radical or humanistic perspective, have stressed the importance of interaction among a group of students as part of the learning process. Burton (1992) states that, "A basic element of andragogy is the involvement of learners in the process of planning their own learning, with the teacher serving as a procedural guide and content resource" (p. 48). Similarly, Mezirow (1991) calls for educators to assist learners to be self-guided, self-reflective, and rational and help establish communities of discourse where these qualities are honoured. My study circle experience is consistent with Burton's and Mezirow's positions. The study circle format allowed participants to plan their own learning, and we demonstrated self-guidance and self-reflection in so doing.

The liberal and radical education philosophies were not particularly obvious or relevant for this study circle process. For example, in the liberal education philosophy, the teacher guides both content and delivery, whereas in this study circle only the content was specified. Freire (1970) supports the radical philosophy, which calls for social action. This call for social action was not a concern of our learning group. However, the behaviorist approach (Skinner, 1978) promotes step-by-step sequenced learning, which my study circle used as we adapted the manual chapters into monthly sessions as we worked through the learning materials.

Progressive education focuses on experience, learners and their needs, and new methodology, including the scientific method. The study circle clearly demonstrated a focus on learners and their needs as the learning experience was designed solely to meet the individual needs and collective needs of the group--to pass the exam.

Humanistic education, according to Elias and Merriam (1980), "is the development of persons--persons who are open to change and continued learning, persons who strive for self actualization and persons who can live together as fully functioning individuals" (p.122). Although we did not have a teacher-student model, the teacher in this model was the facilitator and helper. This approach closely resembled our study circle model as each person was called on to be teacher and facilitator. Overall, ours was an experience of making a behaviouristic process humanistic. We used the processes of humanism and progressivism.

Looking at specific ways one can apply the study circle models to adult distance education, distance education presents challenges in breaking down the barriers of isolation, as indicated by Coulter (1989). Rumble (1986) predicts that institution-centred learning will be replaced by sub groups and individuals, mostly in the middle management level, who will interact using different channels of communication. Our study circle model supported the establishment of sub groups comprised of middle managers. An example of how the study circle used different and fluid channels of communications is demonstrated in how we communicated via telephone, e-mail, and fax, as well as meeting personally. Coulter (1989) asks whether distance education will be empowering and liberating at both the individual and collective levels. Our study circle does answer this question with regard to individual participants. The learning experience was empowering as we took control of our learning.

Why Program Planning is so Important

Educators have the responsibility of planning programs so that the maximum learning level can be achieved. In addition, educators seek to create a positive and human experience for participants. These efforts require planning. In this section, I describe applicable planning elements which relate to our study circle experience.

Caffarella (1994) writes that there are primary purposes for conducting adult educational programs. The applicable points for the study circle include several of these purposes. For example, the learning experience encouraged ongoing growth and development for the individuals involved. Also, this program assisted

us in current and future work opportunities. With the CFRE designation as a result of passing the exam, members of the group could look forward to enhanced career opportunities.

Caffarella (1994) further outlines 11 components to program planning. Five of these were applicable to our group; establishing a basis for the planning process, developing program objectives, preparing for the transfer of learning, formulating evaluation plans, and co-ordinating facilities. Other components, such as preparing budgets, were not required components for our study circle. Caffarella (1994) maintains that establishing the program objective is one of the most difficult challenges for planners. However, in our process, this was one of the easiest tasks.

As Caffarella (1994) indicates, some outcomes are measurable and some are non-measurable. Those who took the exam passed it; this is a measurable outcome. For many, we experienced unmeasured outcomes such as a renewed confidence in our profession recognizing our own expertise. Caffarella cautions educators never to develop programs in isolation--she advises we consult, and engage in the process, all stakeholders: learners, educators and administrators. Although we developed our program within our group, we would do well to have consulted more broadly. Her caution is well taken, and raised in my recommendations.

Transfer of Learning in a Certification-Driven Study Circle

Transfer of learning, the ability to use what is learned after completion of the program, is essential for a successful learning program. Caffarella (1994) provides guidelines for including the transfer of learning into the planning process. Specifically, she discusses the influencing factors for transfer to occur.

For example, program participants bring a set of characteristics, attitudes and values which will influence whether they can and want to apply what they have learned to their work lives. In this study circle, the participants were keen to learn and had prior useful work experiences to link to their learning. According to Caffarella (1994), this linkage should enhance the transfer of learning. The program design also enhanced the transfer of learning as we included the applications exercises in our instructional activities. We created questions similar to exam questions and we also discussed issues and strategies for dealing with fundraising activities.

The issue of organizational context is interesting as we encountered both barriers and enhancers. The NSFRE did not provide any guidelines as to how one might study the manual. However, tangible awards were available if one successfully passes the exam--the CFRE certification. Whether the NSFRE adapts new structures, such as promoting study circles, has not been determined. With regard to the organizational structure of our places of work, I cannot determine the level of support participants received, as I do not recall discussing this issue. However, peers were very supportive and this

enhancement could assist the transfer of learning. An indication of this support is the hospital's offer of a boardroom for our sessions.

Sork (1991) states: "Clarity at the outset of an educational activity is, however, one of the key elements to skills transfer because it links rewards to improved skills. Without clear goals, any educational activity will be acceptable, but only limited transfer will result" (p. 79). We did have a clear goal; skills were effectively transferred as a result of the successful completion of the exam for the majority of our participants. The reward for skills or knowledge transfer was the achievement of the professional designation.

As Sork (1991) indicates, learning is only a means to an end. He challenges educators to recall the best teachers they have had and asks, "What made them so special?" (p. 68). He surmises that these teachers connected with the student; that

> they spoke to where you were at a particular point in your experience. They seemed to understand and put into your learning environment what you need to know and do in order for you to master the environment outside of the classroom. (p. 68)

The study circle joint-facilitator learner-educator approach helped us identify where we were in our expertise in fundraising and assisted in the transfer of learning process.

Evaluation provides an opportunity to determine the effectiveness of the program delivery and, according to Caffarella (1994), is a continuous process. Napier and Gershenfeld (1999) support an open and honest feedback process that will, among other things, increase accuracy. The study circle participants

were forthcoming with feedback, but greater frequency of feedback might have been useful for me in my studies.

There are both planned and unplanned evaluation opportunities and, for the study circle group, evaluation opportunities were presented during personal interviews and through observation. I was able to assess success and failure in the normal sharing of information. For example, when we completed and marked our monthly set of questions, some participants were very frustrated when they discovered they did not answer the questions correctly. Their frustration and feeling of failure was evident throughout the room. Alternatively, these very failures turned into successes as other members of the group offered to clarify or explain the correct answer. Thus, without any formal evaluation method, I was able to observe successes and failures throughout the sessions based on the group interaction and dialogue. Our study circle experience responds in the affirmative to Coulter's (1989) question: "Can education be made an empowering and liberating experience both at the individual and collective levels?" (p. 20).

Implications for Adult Education Practitioners

Baskett and Marsick (1992) maintain that "studies of learning patterns of professionals have shown that, by and large, formally arranged continuing professional education (CPE) programs are much less used than is self-directed and self-planned learning" (p. 9). Our study circle model was such a self-directed and self-planning learning process. In applying this concept to our study circle experience, the opportunity to set our own agenda and meeting schedule was an important factor in the participants' attendance. Caffarella (1994) provides a solid

program planning approach and adult education practitioners should review her model prior to developing any learning plan. The design stage for a learning program should focus on gathering information to help understand the instructional gap between what is and what should be. The steps should include defining the problem or need, understanding the audience, and identifying instructional goals and objectives. How did our study circle model address these planning processes? We defined the need (passing the examination). Although the group did not initially record specific goals and objectives in the planning phase, over the months of discussion and feedback, we refined our goals and objectives. For example, we established the number of sessions, material to be covered, workload assignments, and monthly material reviews.

To understand distance learners better, educators should consider their needs, ages, cultural backgrounds, interests, and educational levels. In our study circle process we did not examine these issues. Assumptions were made that we came to the group with considerable, and valuable, work experience. We relied on this expertise to resolve learning challenges as they developed.

Caffarella (1994) stresses the importance of reports. Our study circle did not present a summary report to the local chapter of NSFRE. Such a step would support Percival's (1993) suggestion to keep all stakeholders informed. A report would keep organization decision-makers informed, and hopefully, supportive of future learning initiatives. This is addressed in my recommendations.

Conclusions

The Centre for CurriculumTransfer and Technology of British Columbia (1999) website lists key principles of learning outcomes as follows: "The learning outcomes approach to curriculum based program and curriculum design, content, delivery and assessment on an identification of the knowledge, abilities (skills), and attitudes needed by both students and society." (p. 1). As I conclude my thesis, I think it is clear that our study circle established outcomes; specifically, we established learning outcomes for knowledge and skills required to pass a professional examination. The Centre for Curriculum Transfer and Technology, British Columbia (1999) website states that "assessment should be seen as playing a crucial educational function by providing a means for students to practice integrative application of their learning and receive useful feedback." (p.1). Learning outcomes and assessment assist in the development of a successful and positive study circle learning experience. Although our study group did not implement all recommended practices, we did learn from the process. Our experience provides a basis for future study circle processes and models. Working with my group, we decided to intensify this distance learning process through the use of a study circle.

Andrews (1992) states there is wisdom in groups and collective learning provides a positive experience. This study circle demonstrated this collective wisdom as we learned from each other. Andrews (1992) maintains that, through study circles, all participants feel empowered to "think for themselves" and that "anxiety about appearing foolish is lost" (p. 23). According to Andrews, there is

no right answer and all are free to participate in a relaxed manner. Andrews' model also includes written materials as a basis for discussion and says that equality among participants is fundamental to the process. The facilitator is used in Andrews' model to facilitate the group, and is not involved as an expert.

When developing a model appropriate for our study circle group, Andrews' model was applicable in some areas, but not all. Although we supported the concept of equality, and allowed participants to be comfortable with the process, we did need to acquire knowledge to pass the exam, and, therefore, the discussion of ideas for their own merit did not fit our requirements. We needed to develop skills in studying for and writing a multiple-choice exam. We also needed to make judgements on what might work and what might not. For example, the suggestion that when in doubt about a question on the exam, select c, was not particularly strategic. As we progressed, we developed new attitudes about our strategic capabilities and requirements.

Certainly, the written materials formed the essence of our discussion, but our goal was to learn and acquire knowledge, not only to discuss ideas. We shared ideas, but in the end we had to establish a "correct" or "incorrect" response for each issue or question posed by the group. In fact, Andrews (1992) maintains that "participants seldom take part just to learn the facts. The importance of what they learn lies in its connection to their lives, their own experiences, and the real problems and issues they face" (p. 23). This was partly true in our case since the participants were eager to learn more than just the facts even though this was not our original purpose. For example, we debated various ethical and practical

issues drawing on our collective experience in fundraising settings. These discussions represented some of our most vigorous learning and helped us to improve our everyday practice.

In our study circle, value was placed on each participant's ideas and communication. Consequently, the goal of mastering a technique, or learning a concrete skill was overtaken by the broader discussion at times during our sessions as referred to by Andrews (1992). The specific learning outcome was often set aside as we pursued the fulfillment of self-actualization through our discussions. Our group went beyōnd "facts."

Andrews (1992) provides some good advice for building successful study circles, including "maintain an open mind; strive to understand the position of those who disagree with you; ...and value your own experience and opinions" (pp. 22-23). Our group demonstrated these values. For example, although we needed to establish the responses for each question posed, our discussions on everyday practices validated our knowledge and re-enforced our memory. The result of this open-mindedness made the multiple choice less threatening and user-friendly by situating the absolute answers in the context of everyday practice.

Our study circle experience provides a framework for other professional groups. I learned that planning is important for learning and all factors, including physical, psychological, and philosophical factors should be addressed. Our learning experience taught us that participants should actively engage in the

articulation of needs and definition of individual and collective goals and objectives. Through the successful and unsuccessful application of evaluation techniques for our study circle model, I now value and understand the role and techniques of evaluation with greater clarity. Caffarella's (1994) guidelines on program planning emphasize the importance of building an evaluation plan early in the design process.

Our study circle model did not incorporate the reporting and stakeholder-building components for adult practitioners engaged in continuing professional education. Future learning groups should work with their organizations to plan and effectively implement a reporting process. Technology was under-utilized in our study circle model; future learning groups have significant opportunities to more effectively incorporate the Internet into their planning and practice. Through the implementation of our study circle model, and lessons learned, I offer in the next section guidelines for the application of a study circle model for professionals in a distance learning framework.

Suggested Guidelines and Recommendations for Research and Practice

Based on my experience, I have extracted eleven guidelines, which I offer as suggestions to others seeking to develop a study circle model within a distance education setting for professional certification. These are supported by specific recommendations, where applicable.

1. Engage in an informed program planning process. Caffarella (1994) presents a planning model that is useful for study circles. Drawing on her ideas, and in addition to them, I suggest a broad consultation process with the

stakeholders before, during, and after the completion of the study circle learning program. This planning process should include plans for evaluation and reporting (please note recommendations 2 and 3). Initially, I recommend the study circle group liaise with the headquarters of the certifying agency to determine the materials required and whether there are best practice models available for reviewing the materials. This consultative process could lead to an agreed upon pre-determined set of materials, and avoid the situation my study circle experienced using two different sets of manuals. For international certifying agencies, early discussions might provide support for materials based on Canadian content and regulations, thus avoiding inconsistencies and confusion over content as was the case for our study circle program in Canada. Discussions with peers, the professional organization, and other experienced professional colleagues throughout the learning process could provide helpful suggestions and assistance to the study circle with refinement of methodology. These steps should be built into the planning process at the beginning to allow the study circle group to receive maximum support from broad consultation with the stakeholders. I would more broadly consult with the stakeholders before, during, and after the study circle.

2. Engage in an intensive evaluation process. I suggest an open discussion or written comments after each meeting. During the planning phase, the program design should include scheduled and frequent time for feedback and dialogue. A regularly scheduled feedback process will allow the group to refine methodology as well as encourage a supportive and engaging

environment for learners. I recommend a personal interview with each participant at the conclusion of the study circle as one of the final steps in evaluation of the learning experience.

3. Provide a final report to the local chapter and/or headquarters of the professional certifying agency. This step should flow from the planning phase as an important part of the evaluation process. Such a report would provide useful information for the professional body so they could determine the future role of study circles in the certification process.
4. Establish a mentor or facilitator at the certifying organization's headquarters and/or local chapter who can provide counsel. This step should follow from the planning process. A supportive and knowledgeable professional individual could provide continuing and consistent guidance to the participants throughout the life of the study circle.
5. Engage the group participants in a discussion on educational philosophy. I suggest providing some background reading materials on the different philosophies (e.g., Elias & Merriam, 1980) and ask the group to identify what they believe and value. Participants could then choose to have a broader discussion on their beliefs and values which could guide us in developing the learning experience. This initiative should be developed in the planning process.
6. Together with all participants, create a list of learning objectives. This list could help to anchor the process. This anchoring should probably bring about

the establishment of a format and guidelines more quickly than was demonstrated in our experience.

7. Provide information and discussion on group communications (e.g., Napier & Gershenfeld, 1999). Too often, adult educators form learning groups without giving them the skills and tools to create positive communications and feedback. Both of these factors are critical to the success a study circle learning experience. To enhance group trust and cohesiveness, participants should regularly schedule opportunities to share news and information. Build a solid framework for feedback that will encourage adults' active participation--adults want to be involved and engaged in the learning process. In addition, participants should be aware of the importance of informal groups. Informal groups can provide support and encouragement for the participants and it would be helpful for participants to be aware of the strengths and opportunities associated with informal groups.
8. Encourage the learning group to use technology to assist in the learning experience. For example, an e-mail group list should be set up so members can share information quickly and easily during the time between the sessions. External consultants should also be available to the group list via e-mail, so questions and answers can be shared directly with the learners. It might be useful to have the learning materials available on a website, even if there is an associated cost, for learner and educators to access the same information. E-mail and the Internet should be used extensively as a way to

better incorporate easily accessbile distance education technologies into the learning experience.

9. Encourage professional practitioners, when involved in a learning program, to situate the questions and the "right" answers in their everyday practice. This grounding in practice will help to reduce the fear of certification testing, and help to develop comfort around certification. An important step in overcoming fear is to draw on practiced knowledge, express this knowledge, and validate it.
10. Recommend to the NSFRE, and other certifying agencies where applicable, that they consider implementation of a study circle for continuing professional education in other chapters or geographic locations. Certifying agencies should seek a founder for a study circle if one does not emerge spontaneously.
11. Recommend to NSFRE, Vancouver chapter, that recruitment and continuing professional education opportunities appropriately reflect the diverse community of the Lower Mainland.

For future study circle models I recommend that learners and educators take time to reflect on their beliefs about educational practices. Although we did not do this in this case study, I believe this activity might have made a valuable addition to the study circle model.

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