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Peer Learning Toolkit

Integrated Work

Prepared by:
Integrated Work
5408 Idylwild Trail, Suite A
Boulder, CO 80301
(303) 516-9001
www.integratedwork.com

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Peer Learning Basics

What is Peer Learning?

Peer learning occurs in a range of settings and is known by many names. An organization's staff may engage in interdisciplinary collaboration, leadership development opportunities, learning cohorts, communities of practice, peer learning teams, collegial networks, or committees. Peer learning may occur as a component of some larger organizational initiative or in smaller pockets within or across organizations. In all of these settings, peer learning is an effective professional development strategy that can be used to help individuals benefit from the knowledge, skills, resources, and perspective of others with the ultimate goal of developing the individual and the organization to achieve its strategic goals.

Peer learning brings colleagues who have comparable roles together to address common issues and opportunities with the purpose of improving by leveraging one another's experience.

Why Peer Learning?

Most professionals have plenty of experience learning in classroom settings, through one-on-one instruction, or by accessing reference materials such as books, journals, and online content. Fewer have experience learning in a professional community setting where they *are both learner and teacher at different times*.

Peer learning is an approach to professional development that *is aligned with the learning preferences of most adults.* For example, in *Six Principles of Adult Learning*, Malcolm Knowles notes that adults:

- Are internally motivated and self-directed.
- Bring relevant life experiences and knowledge.
- Tend to be goal oriented.
- Look for relevance in their learning.
- Want to apply learning in practical ways.
- Expect to learn from others who have held similar roles.
- Need to feel respected.

Peer learning aims to *develop existing talent within and across organizations*. This approach *provides staff with a tailored opportunity* to grow their skills and knowledge as well as test ideas in a comfortable environment with others who really understand their work. Participants are able to boost their professional capabilities and effectiveness by: 1) building collegial relationships and networking; 2) clarifying and refining approaches to their work; and 3) sharing best practices.

Additionally, peer learning *creates motivation and accountability* as each participant contributes to the overall success of the peer learning experience. For these reasons and also because the approach is well aligned with adult learning principles, peer learning may often be preferable to an instructor/student learning format. Learning from colleagues in a group setting is one of the most effective ways to explore real, on-the-job challenges and ways to address practical issues.

A well-designed peer learning project has benefits that extend beyond participants in the groups. Sponsoring organizations *learn about the needs of their constituents*, early warning signs of concerns and issues that are brewing, as well as concrete success stories to share with their funders and stakeholders.

Individuals who facilitate peer learning experiences *receive an invaluable education* about the nuances of the field, the challenges of implementing policies or approaches advocated by the sponsoring organization, and, ultimately, how to best support professionals on their path to increasing individual and collective capabilities.

An additional benefit is that the popularity of such a program *can increase visibility, membership, and goodwill* towards the sponsoring organization, as well as provide a receptive forum for communicating messages and getting feedback. Because relationships are often maintained over longer periods of time compared to other types of training programs, peer learning *can provide an ideal setting for a long-term focus group* to test new ideas and approaches and/or get a sense of constituent needs.

How Does Peer Learning Benefit Participants?

As a professional development approach, peer learning provides many benefits to participants.

- Discussion topics are specific, relevant, and customized to participants' current responsibilities, needs, and interests. People enjoy knowing that others have similar challenges and they are not alone.
- Learners respond better to hearing how someone has actually solved a problem, such as when fellow participants talk about their own experience, as opposed to being told by a trainer about applying an idea or theory.
- Participants easily forge bonds, advise, and inspire one another because they share so much in common in their work. Additional collaboration and networking occurs over time outside regularly scheduled meetings based on connections established during learning team exchanges.
- Individuals can leverage the collective wisdom of their peers when they most need it.
- Conversations are cumulative, incorporating participant expertise and building on shared knowledge gained across multiple topics.
- Supplemental resources, articles, tools and subject matter experts may be brought to bear on specific areas of interest by team participants and facilitators.

When is Peer Learning the Right Approach?

There are a variety of circumstances and types of projects that benefit from implementing a peer learning approach. Invoke the 'power of the peer" when:

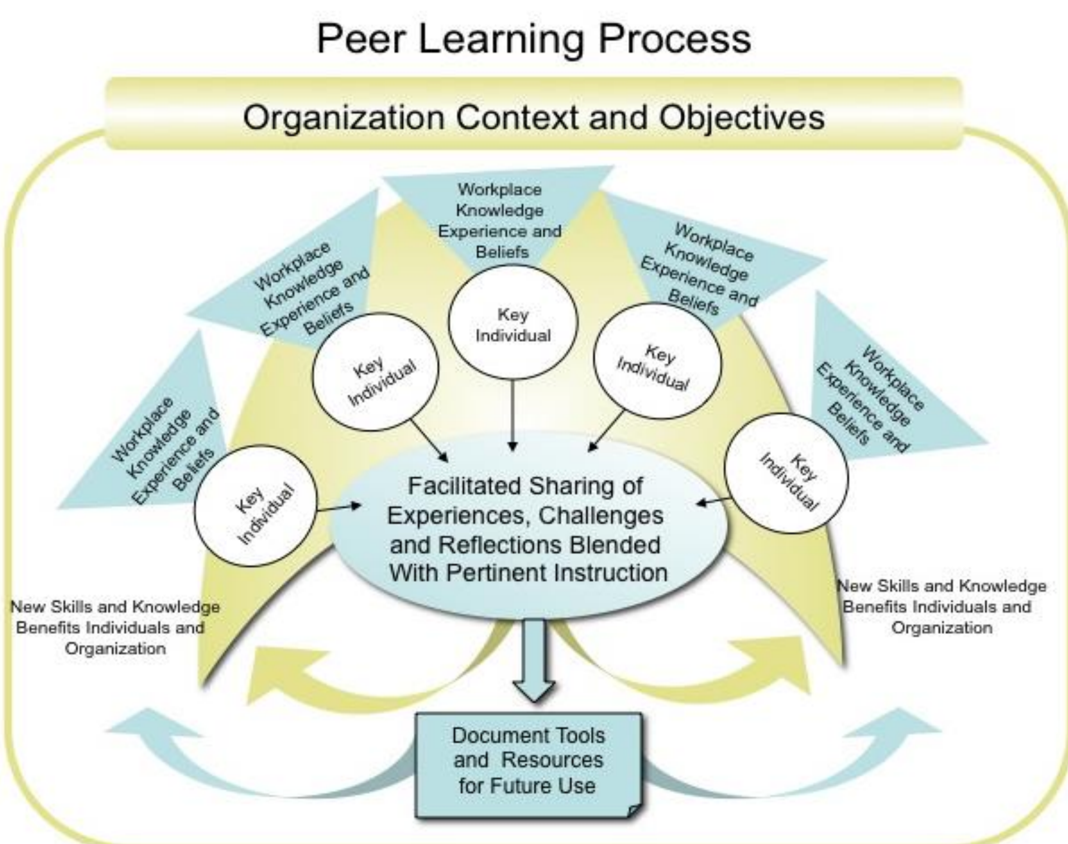
- The essential knowledge and hard-earned wisdom about a topic is distributed throughout the group; it does not live within a specific person or group.
- One-to-one assistance is too labor intensive. The need for an "authority" to work directly and intensively with each person or organization isn't feasible.
- Participants would benefit from ongoing interaction versus a one-off training.
- A one-size-fits-all approach to implementing skills or knowledge won't work.
- Multiple people or organizations have a stake in the success of the learning collaborative.

Criteria for Ideal Peer Learning Team Participants

Below are some of the ideal characteristics of peer learning participants.

- Would like to connect with others who share a common cause, mission, or work responsibility but who are geographically or functionally isolated.
- Would benefit from "cross-pollination" across different initiatives, programs, or locations to serve an overarching mission.
- Require additional training and experience but have a limited budget for individual professional development.
- Are aware of both strengths and areas for improvement in their knowledge and abilities.
- Are new to their position and would benefit from peer mentoring.
- Are experienced in their role and want to share their knowledge and experience with others.
- Are currently in flux due to outside pressures and influences (e.g., changes in the marketplace, laws/policies, economic impact, etc.).
- Have come through a steep growth curve or crisis and are ready to focus on operational efficiency and excellence.
- Are willing to contribute thoughts and time to create a more valuable experience for everyone.

The Peer Learning Process



Designing and Launching a Valuable Peer Learning Experience

Strategically designing a peer learning session helps ensure a more valuable experience for participants and the sponsoring organization. Consider the following questions and tasks.

- **Determine purpose and desired outcomes.** What are the objectives and desired outcomes for the peer learning experience? What do the project sponsors want to achieve? What will make the experience valuable for participants? What needs to happen for the project or experience to be worth the investment? What will success look like? How can we measure progress toward goals?
- **Select groups or teams.** What group(s) or team(s) make the most sense based on participants' job roles, a particular area of focus, or an emerging "hot topic" to explore. What job roles or topics will benefit from relationship-building and sharing of ideas, experiences, and resources among peers? Each group or team benefits from facilitation of the team interactions and manage project tasks. When working with multiple organizations, or divisions, teams can be formed by slicing the organization functionally, and building separate teams for each slice.
- **Generate support.** Whose buy-in do you need for the project to go well? What is most important to him/her/them? How do you envision this/these individual(s) being involved in the peer learning experience to ensure continued support?
- **Outline participation.** How will the participants be selected (e.g., manager selected, self select, nomination, or application process)? How will participants join or learn about the peer learning experience? What marketing and communications will you use to educate participants about the experience, benefits, and next steps?
- **Define a structure for the experience.** How will participants interact (e.g., conference calls, webinars, face-to-face meetings, listservs, via an online forum, etc.) and how often? Selecting a few modes of interaction works best. How can participants interact in between formal sessions? Giving participants a way to interact between sessions builds relationships and allows peer learning to occur real-time. Establish parameters for behavior, expectations, group norms, etc. See *Keys to Peer Learning Success* on page 9.
- **Create systems and processes.** What systems and processes are needed to manage the experience (e.g., calendar, task management software, contacts management, email platform or listserv, participant lists/attendance tracking, on-line document storage etc.)? What templates would be useful (e.g., agendas, summary notes, facilitation guides etc.).
- **Start participant communications.** Send an invitation or welcome email along with an overview of the experience or team(s) including a schedule of calls and meetings if possible (see the sample located in additional resources). The facilitator or project manager typically conducts these conversations. Let participants know how they can get in touch with one another and the facilitator in-between sessions to ask questions.

Facilitating Meaningful Conversations

Facilitation can make or break a peer learning experience. Outlined below are facilitator responsibilities, suggestions, strategies for getting through challenging situations, and examples of different facilitation formats from which to select when planning a session.

Facilitator Responsibilities

The facilitator's role is to support a discussion process that brings out the potential contributions and leadership abilities of all participants. The facilitator and participants work together closely to achieve collective goals. Facilitators help move the meeting forward without imposing their own ideas on the group. Any meeting participant can assume the role of facilitator, occasionally, to help the group. When a facilitator's process is successful, desired outcomes are met, ownership emerges in the group, and each person experiences value and feels respected. Following are some important facilitator responsibilities.

1. Keep the group focused on the topic and moving the call or meeting forward.

2. Balance participation so most, if not all, participants have an opportunity to speak. If someone is dominating the conversation, ask them to wrap up and give someone else an opportunity to participate. Ask to hear from people who have not yet spoken.

3. Use your listening skills. Summarize and restate in a neutral manner as needed, or ask someone to restate what he or she heard. Ask questions to clarify what someone is saying if the group is unclear. Listen for the gem of wisdom or important nugget in each comment.

4. Remind people of guidelines as needed. Do not allow put downs or interruptions. This is a critical aspect of the facilitator's role, and can be one of the most challenging.

5. Stick to the times on the agenda. Ask the group what it wants to do if there is not enough time to complete an agenda item. If the group wants to extend the time for an agenda item, the meeting needs to be extended or the time for another item needs to be reduced.

6. Use a "bin" or "parking lot" for issues that come up and are not on the agenda. Make a plan for addressing each tabled issue before closing.

7. Gently challenge assumptions and premature conclusions, helping the group gain a better understanding of deeper or underlying issues.

8. Record proposals on flip charts, or ask someone to assist with this. Some people are visual and need to see a proposal or critical information before making a decision.

9. Help build consensus by restating common ground, as you hear it, and by making connections between different perspectives.

10. Check for consensus when you think the group has had an opportunity to discuss concerns and reach some agreement. Repeat agreements as you hear them to help the group and to make sure the note-taker has the language to which the group agrees.

11. Clarify the decision-making process. Help the group decide if the decision will be made by vote, a specific leader, consensus, or some other method. Ensure the method is used effectively.

12. Track action items, and clarify who has committed to which actions and when they will be completed.

Engaging Participants

In addition to valuable discussion topics and effective facilitation, the success of peer learning groups depends, in large part, on relationships that develop between participants and the facilitators as well as among participants. Facilitators or project managers can use the following techniques to increase participation and engagement in the peer learning experience.

- Provide summary notes that capture key ideas and insights from the peer learning event so participants can refer back to them and obtain continued value through their participation.
- Give participants access to a listserv, discussion forum, or email system so they can connect with and ask one another questions in between peer learning events.
- Conduct participant check-ins to connect with individuals belonging to the peer learning experience. These check-ins build closer relationships and generate future discussion topics.

Staying On Track

After a peer learning experience is up and running, take some time to examine these areas to evaluate and stay on track with your project's objectives.

- Participants understand what peer learning is and how it will benefit them.
- Discussion topics are selected based on feedback from participants.
- Conversations draw out participants' experiences, knowledge, and resources to share across the group.
- Groups operate in a supportive and confidential environment that recognizes the diversity of people and circumstances.
- Strong relationships form with and between participants.
- Selected experts and resources add value to the group experience.
- Participants have the ability to interact between sessions, further strengthening relationships.
- Agreed-upon systems and processes are in place to manage peer learning experiences on an ongoing basis.

Questions to Enhance Facilitation

1. **Questions to use to check if information is CLEAR**
- Is there someone who'd like to summarize what you've heard?
- What I just heard is _______. Is this right?
- Sonia, you said _______. I'm wondering if you could expand on that?
- When we first started talking about this, the issue was A. Now it seems like the focus is B. Is this true?
- Heather, I heard you say that we should use ____ [method, strategy]. Are there any other [materials, approaches] we can tap?

2. **Questions to CLARIFY a point**
- And where would that lead? What else could you do?
- Can you say more about that?
- Can you explain what you meant by that?
- On the one hand, we've heard ____. One the other hand there's ___. Can you talk more about that?
- You want to do that because…?
- Why is that important?
- I'm trying to understand this point. Can you tell us what you meant by ____?
- And what does _____ look like to you?

3. **Questions to make information ACTIONABLE**
- I just heard you say we should do ____. Is this something folks have tried or would know how to do?
- I've just heard you say ____. How would you use this in your organization/work?
- How has this worked for you in the past? What would you do with it now?
- We've just heard about ____. What needs to happen next?
- Could you break that down for us? How do we go about doing this?
- What do we need to get us started on this work?

4. **Questions to test the RELEVANCE of information or approaches**
- Can someone give an example of this [idea, concept, problem] in their work?
- From the perspective of a [function] how will they use this information [lesson, resource]?
- From the perspective of ____ it seems like ____ might play out this way. From the perspective of [another group] it seems different. Does anyone have thoughts on this?
- It seems like we have two competing points of view. How can we reconcile these perspectives? What would a middle ground look like?
- Previously, we discussed this experience. Does that apply here?

5. **Questions to EVALUATE and WRAP UP**
- I'd like to take a few minutes to hear about what we've learned today. Can someone share one new thing they've taken away from this conversation?
- What did we take away from this conversation? What can we do with it?
- As we've recapped our conversation, what other items come to mind?
- Are there any other parts of this discussion that folks would like to explore before we finish up?
- How's this conversation going for folks?
- How did this work for you? Is this what you had in mind? What else would you like to know about this?

Keys to Peer Learning Team Success

Engagement in a peer learning team reaps many rewards: you develop strong professional connections with colleagues who are in similar roles; share and receive practical knowledge, ideas, and tools to help in your work; grow professionally as you learn new ideas, take risks, and mentor others; and give and receive support dealing with the challenges you face. Through active involvement in the peer learning team, you and your organization will be more effective in your work.

The most important factor in the success of a peer learning team is how well you prepare for, participate in, and interact with others during and between conference calls, webinars, meetings, and other related events. Here are some ways to get the most out a learning team experience.

1. **Prepare your thoughts.** Prior to each call or meeting, spend time thinking through the discussion questions or agenda topics. Reflect on what you want to learn, potential questions to ask peers, and items you can share that will benefit others. Give your colleagues the benefit of your thoughtful preparation.

2. **Minimize disruptions.** Choose a location for participating on conference calls where you are unlikely to be interrupted. Avoid cell phone connections when possible. Do not place the call on "hold" as this often creates disturbing sounds or music for the other participants. Place the call on "mute" if your environment is noisy or you need to step away from the call.

3. **Actively participate.** Listen closely to the dialogue during peer learning interactions. Minimize multi-tasking such as writing emails or completing other work. Consider how the topic of discussion relates to your work, or how you can modify someone's idea to best fit your own situation.

4. **Protect confidences.** Conversations will be most candid if everyone agrees to keep confidences with each other. Keep sensitive information inside the peer learning team.

5. **Be candid**. Express your opinions openly and honestly. Use the peer learning team as an environment to share thoughts, challenges, ideas, and perspectives that you may be unable to discuss in other settings.

6. **Respect others and their ideas**. Bring an open mind. When conflicting opinions arise, try to understand how another's response could be true for them. Ask yourself what is behind their thinking. Remember there are many potential answers and solutions to each question or challenge.

7. **Stretch yourself**. Use the calls, meetings, and other interactions to reach beyond your usual perspectives and frame of reference to see how a situation looks to others. Imagine the "what-ifs" and a fuller range of possibilities to see issues in a new light.

8. **Build relationships.** Use the peer learning team to broaden your network of peers and colleagues. Follow-up with fellow participants in between calls and meetings for further discussion, peer coaching, to ask them for resources, and build professional connections.

Peer Learning Discussions – Structure/Format Options

Round Robin
Allow each person an opportunity to speak to a specific issue or decision. Consider putting a time limit on each person's speaking time, such as a couple of sentences or two minutes. People may choose to pass.

Case Study/Show & Tell
One or more peer learning participants shares a project, situation, tool, resource or anything that other team members might be interested in learning more about.

Subject Matter Expert (SME)
Sometimes it's helpful to bring in an outside expert to share information about current trends and issues, bring a new perspective on a topic, educate participants on a subject, etc. This can be done as a teleconference or webinar, particularly if the speaker has slides or resources to share. It's a good idea to vet the SME for their understanding of the team's context, the purpose of peer learning, and how to engage participants throughout rather than merely presenting information.

Panel Discussions
When discussion on a peer-learning topic would benefit from multiple perspectives, a panel discussion is often the best format. Panelists can be team participants and/or outside experts, depending on what would be most valuable to the team. Having no more than three or four panelists is ideal, particularly if the discussion is only an hour. Again, this can be done in webinar format, and it's important to vet and prepare the panelists to understand the purpose, context, and format of the peer learning discussion.

Brainstorming
Make a space for the group to generate a list of ideas *without* analyzing which might work and which will not. Often, the most unlikely ideas will contain seeds of a solution. Record the group's ideas or ask a participant to do so. Once brainstorming is complete, support the group in identifying high-potential ideas that can be investigated or acted upon.

Straw Poll
A poll can be used to better understand where participants are on an issue, to gauge their interest in a particular topic or approach, and engage them to participate on a topic that might be sensitive or make them feel vulnerable. For phone polls, ask participants to hit the "5" key to indicate yes to a particular question. A poll can also be done via webinar, or by a show of hands or post-it notes during an in-person meeting.

Small Group Discussion (in person or using audio breakout groups)
Some people integrate new information or generate ideas more effectively through small group discussion. Divide participants into groups of two or three. Indicate the topic of discussion, give the group time to interact, and then ask each small group to report some of their key thoughts to the larger group.

Walk and Talk (in person)
To promote networking, creative thinking, and a "fresh air" break, participants can engage in a walk and talk session. These usually go for 30-45 minutes, and can be structured around a particular topic or as an opportunity for peer mentoring on subjects the participants choose.

Speed Dating (in person)
Split the group in half. Have each person sit directly facing one another, designating one partner "Person A" and one "Person B." Person A shares a work issue that they are currently facing. Person B listens and offers suggestions from their experience. The first person cannot argue or disagree with the suggestions and can ask clarifying questions. Switch after three minutes. Person B person shares a challenge and Person A responds in kind. After three minutes, Person A stays in place and Person B moves down one person to the right. The same process continues for two or three rounds.

Deep Listening
When more heated topics arise, provide a structured listening environment in which people have an opportunity to speak without interruption or immediate response from other participants. Ask people to reflect on the implications of each comment, or have someone with a different perspective restate the main points of what they heard.

Peer Learning Facilitation Resources

Handling Silence

After her first call, a new facilitator said, “One of the challenges was the ‘crickets.’ There were a few points in the call when no one responded or offered their experience. How can I engage participants?”

Fellow facilitators offered the following tips.

- **Use humor.** With a light voice observe, “I hear crickets [tumbleweeds], etc. How about you folks? What am I missing?” Often getting the group to chuckle or laugh with you can help break the silence and spur someone to share or to re-direct the conversation to a useful topic.

- **Use a closed-ended question.** While open-ended questions (what, where, when, how) are best for facilitation, sometimes a yes-no question is easier to answer. From there you can acknowledge the aggregate (I hear lots of yes’s or no’s) then ask a related specific, open-ended question.

- **Call on several people.** Rather than singling out a particular person, call on a few people or even states. “Linda, Steve, Jennifer, what’s on your mind?” Or “What’s going on in Virginia, North Carolina, California, or Arizona with respect to _______?”

- **Offer a resource.** “Would a ______ (specific, tool, template, website, report, article, etc.) be helpful to you?” Getting them to say yes can then spark more conversation about what is really needed.

- **Acknowledge lack of knowledge.** Often people are reluctant to admit what they don’t know. Try something like, “This is often a challenging issue for many emergency managers. What’s the burning question on your mind about this?” or “If you were to try this with your department, what would you need to know/have/do?”

- **Solicit primed participants ahead of time.** One of the most successful strategies we use to combat crickets is to identify a handful of participants ahead of time who have something to say on the topic. This involves more preparation time, but when the facilitator contacts a few members of the peer group ahead of time, it makes for richer conversations that flow more easily. Ask the participants contacted in advance if they have experience, challenges, or ideas about the topic that they would be willing to share with the group. Sometimes individual calls are necessary, but often just sending an email to the group will inspire some volunteers.

Peer Learning Facilitation Resources

Dealing with Challenging Facilitation Situations

Challenge	*Intervention*
Conflict within the group	Identify the signs of conflict: tone of voice, word choice, body language. Help them solve the problem rather than imposing your solution. Insist on respect for people, even though there are opposing ideas. Use role reversal between conflicting members to facilitate their understanding. Emphasize common interests and goals.
Group is off track	Check in with the group to see if the new track is more valid. If so, negotiate to change the agenda. If they want to keep with the original track, offer to put the new issues in the "parking lot."
One member dominates discussion	"Let's hear from someone who hasn't spoken yet" or "I'd like to ask the group what they think about Joe's comment."
Group is restless and/or unfocused	Ask: "What's going on?" Refocus the conversation—what is really at issue here? Consider a break. Check-in with a few individuals and plan changes.
Interruptions	"I'd like to hear the rest of what Jane was saying before we respond to it," or "Let's give John the chance to finish his thought before we continue."
Group attacks	It's not personal! Check in with the group to see if you can explore what's behind the comments or criticism. Look for the intention. What is really at issue?
Vague or incomplete input	If you don't understand the comment, it's likely others didn't either. Clarify by asking: "Can you say more about that?" or "What do you mean?"
Silence	Silence can be a GOOD THING! Use silence as a time for reflection; encourage the group to take a few minutes to jot down their thoughts at the moment, then share ideas and suggestions.

Peer Learning Follow-Up

Follow-up content and participant interactions are particularly important to group learning exchanges. They offer opportunities to revisit and process information, reconnect to an issue, and take the next steps to action. There are a few specific steps to think about in preparation for developing and distributing follow-up content and/or connecting with participants in between peer learning exchanges.

- **Anticipate follow-up content.** Predicting the types of follow-up content you will produce will help you in two ways. First, you know what kind of time you should set aside after the exchange to complete the work. Second, anticipating follow-up content will help you collect the information you need while the exchange is still in progress. It might be useful to develop categories of possible content, such as resources, summaries, or contact lists. This will help you know whom you need to contact for follow-up information, as well as track types of information mentioned during the call, webinar, or meeting.
- **Create collection and distribution systems.** Just as with pre-meeting materials, set up systems to track and send out materials. It's a good idea to keep a list of follow-up materials requested or mentioned during exchanges, to make sure they don't fall through the cracks. As for distribution, using the same system set up for pre-exchange materials or other communications is usually the best approach—no duplication of systems is necessary.
- **Plan follow-up conversations as needed.** For some conversations, the follow-up that is most constructive is another opportunity to talk about the same topic. Watch for issues that seem unresolved or not fully explored. Solicit requests for future conversations and if the same topic or a related one comes up, it's a clear signal that it's not time to put it to bed yet. Remember to be specific about what exactly remains to be discussed within the topic.
- **Pay attention to participants' environments.** Facilitating an effective peer learning exchange requires having a strong understanding of the challenges and opportunities participants face. Take time to have informal conversations with participants to learn more about their daily work and stay informed about events and changes in participants' environments. Check in systematically and at every opportunity to understand big events, information needs, and details about daily work.
- **Build real relationships.** With group learning exchanges, each participant is a partner who brings expertise, ideas, and real-life experiences to the table. In order to tap their know-how, build trust, interest, and a real sense of connection with participants. Take time to establish a good working relationship with participants, and they will be more engaged and committed.
- **Foster peer-to-peer relationships.** One of the facilitator's greatest responsibilities in a group learning experience is to help participants build relationships with each other. While the information that participants share during an exchange is important, having the ability to access each other outside the formal exchange is equally vital. By helping participants establish connections with each other, the facilitator greatly increases the effectiveness of the group. Make time in each exchange for participants to talk informally. Provide participant contact information after each exchange so that they can follow up with one another.