

**EVALUATING THE EFFECTIVENESS OF VIDEO CASE STUDIES AS A VALUE CHAIN  
MANAGEMENT (TEACHING) LEARNING METHODOLOGY**

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**Abstract**

*While value chain management is emerging as a business model that can assist farmers to adapt to a rapidly changing business environment, the rate at which closely-aligned value chains are forming in the agribusiness industry is slower than in other industries. This research examines the effectiveness of experiential workshops for motivating Canadian farm managers to adopt value chain management approaches. Structured to reflect theories of adult learning, value chain management and farmers' preferred learning styles, the workshops used a combination of video case studies of successful value chain initiatives and interaction among the participants to establish an emotional connection between the individuals and the topic of value chain management. The expectation was that this would motivate farm managers to learn about a topic not traditionally associated with agriculture, and lead to them applying the acquired knowledge to solve problems faced in their daily lives.*

*The immediate effectiveness of the workshops was evaluated using exit surveys. The longer-term impact of the workshops on influencing changes in the perceptions, attitudes and behaviour of farm managers was evaluated through interviews conducted an average of 14 months after each workshop. To gain broader insights into not just if, but also why, the workshops may have been effective in motivating changes in the farm managers' attitude and behaviour, interviews were also conducted with the workshop hosts and organizers. That the researcher and workshop facilitator was the same person, further strengthened the chain of evidence that stretched from the workshops' inception through to the collection and analysis of results.*

*The results show that experiential workshops are an effective means of motivating farm managers to learn about topics not traditionally associated with agriculture, then act upon their newly acquired knowledge. In changing the majority of participants' perceptions towards their businesses, other value chain participants and the overall environment in which their businesses operate, the majority of farm managers who attended the workshops were found to have made changes in the business practices. Forty percent of those who changed their behaviour benefitted financially through increased revenue, reduced costs, or a combination of both.*

**Keywords:** Value Chain Management, Training, Experiential Workshops, Adult Learning

**Introduction**

In less than two decades, industry deregulation, globalization, consolidation and restructuring, along with changing consumer demands and technology, have resulted in marked changes in the agribusiness environment (Boehlje, 2006; EFP, 2004; Hughes, Fearne, and Duffy, 2001; Whipple and Frankel, 2000). To remain competitive in this rapidly changing environment, farm managers need management skills that go beyond those directly associated with crop or livestock production (Boehlje, 2006; Bonney et al., 2007; Fearne, 2007). In particular, it is argued that building closer strategic relationships with customers and suppliers are becoming increasingly important as an adaptive business strategy (EFP, 2005; Senge, Dow, and Neath, 2006). Value chain management

(VCM) is such a strategy, involving deliberate decisions by members of a producer-to-consumer chain to collaborate so as to improve competitiveness (Dunne, 2008; Fearn, 2007; Taylor, 2006). However, VCM is a relatively new concept, and the rate at which more closely-aligned value chains are forming in agribusiness is slower than in other industries (Cowan, 2007; Fearn, 2007; Fortescue, 2006). Fearn (1998) and Hemal (2001) suggest that the slow rate of adoption of VCM is not due to farmers being unaware of the need for change, but because farmers are not sufficiently motivated to change long-term attitudes and behaviour (Fell and Russell, 2000; Johnson, 2007). Fulton et al. (2003) and Kilpatrick et al (1999) note that there is little research into how farm managers can be encouraged to adopt business models that extend further along the value chain.

Creating change requires a shift in mindset (Senge, 1997) and one way to begin this process can be through workshops (Schein, 1988). Importantly, individuals will not support new management approaches just because they are advocated (Schein, 1999). Before change can occur, individuals must possess the knowledge, mindset, motivation and capabilities to change (Barrat, 2004; Rao Tummala, Philips, and Johnson, 2006). Workshops can help to demonstrate that the potential benefits of a change in behaviour are greater than the potential risks involved (Jarvis, 2004; Schein, 1999).

### **Double Loop Learning**

Even if an individual possesses knowledge that suggests a change in behaviour is warranted, it will be insufficient for motivating an individual to act unless they also possess a mental model that supports the need and desire for change (Moon, 2004; Senge, 1997; Zull, 2002). Mental models are made up of ideas and assumptions through which individuals perceive their environment, so to achieve change, a learning experience such as a workshop has to engender a change in mindset as well as an increase in knowledge (Jarvis, 2004; Moon, 2004; Zull, 2002). For this to occur, training initiatives must be designed to reflect the preferred learning styles of the target audience (Kolb, 1984; Moon, 2004) and must achieve double-loop learning (Argyris, 1995; Ison and Russell, 2000). Double loop learning occurs when an individual critically assesses the assumptions which underpin his/her ideas, and many training programs fail because participants do not achieve double-loop learning and therefore fail to change behaviour (Argyris 1995, Senge 1997, Zull, 2002).

Little research has been published that would help design the content and delivery of farmer VCM workshops whose objective is to establish an emotional link between the material and the audience, a link that is known to be the most effective way of changing individuals' attitudes and encouraging them to act upon newly-acquired knowledge (Austen, 2002; Jarvis, 2004; Zull 2002).

### **Experiential Workshops**

Researchers such as Fulton et al (2003), Ison (2000) and Kilpatrick et al (1999) suggest that farmers may not be motivated to learn about topics other than production agriculture because doing so creates a sense of anxiety that limits their ability to absorb new information – particularly that which may contradict current values and beliefs. Compared with more passive approaches, experiential learning is a more effective way of encouraging adults to learn then act upon their new found knowledge (Argyris, 1995; Jarvis, 2004; Zull, 2002). Experiential learning uses a facilitator to guide learners through a first-hand experience that involves a meaningful interaction with their peers (Argyris, 1995; Fell & Russell, 2000; Moon, 2004). For participants, this heightens desire and motivation to learn and establishes an emotional connection between the individual, the topic, and how they can apply the knowledge to solve a problem in their personal situation (Kolb, 1984; Moon, 2004; Fulton et al, 2003; Zull, 2002). The resulting sense of achievement motivates them to continually reflect on their knowledge to develop higher states of learning and more sophisticated problem solving skills (Argyris, 1985; Jarvis, 2004; Knowles, Holton, and Swanson, 2005).

### Teaching Value Chain Management Experientially

The knowledge necessary to become a member of a closely-aligned value chain involves three requirements:

- Firstly, individuals need to possess the conceptual knowledge as to *why* the partnership is being formed (Batt, 2002; Duffy, 2005).
- Secondly, they need to have the operational knowledge as to *how* to operate as a closely-aligned value chain (Boehlje and Lins, 2008; Hornibrook and Fearn, 2005; Whipple, 2007).
- Thirdly, and especially for farm managers who see themselves as sole operators focused on producing crops or livestock, the knowledge they acquire needs to lead to them consciously recognizing themselves as part of a larger system (Boehlje, Hofing, and Schroeder, 1999; Fulton et al., 2003; Johnson, 2007).

In the context of a workshop, experiential learning should commence with a concrete experience that, through a process of reflective observation, followed by abstract conceptualism and active experimentation, leads participants to develop problem solving skills that they could later apply in their own situation. As farmers prefer to learn through seeing, hearing and interacting with peers (Fulton et al, 2003; Kilpatrick et al, 1999; Fell & Russell, 2000), and a value chain invariably involves multiple stages spread across a wide geographic area, video case studies of successful value chain partnerships may offer a means of providing farmers with a concrete experience from which experiential learning in a workshop setting could take place. Gross Davis (1993), de Bono (1999) and Zull (2002) support the use of video for providing a concrete experience upon which individuals can later reflect. The value of video as part of a learning process comes from its ability to appeal to multiple senses while accurately depicting circumstances and issues to which the audience can readily relate. Video also allows for a large volume of information and differing perspectives to be conveyed in a short period of time.

### Research

This research was made possible by the development of a DVD that detailed the principles of VCM, along with a series of international case studies describing how VCM principles had been successfully applied in the agri-food industry. It was supported by the Canadian Farm Business Management Council's willingness to sponsor eleven introductory VCM workshops across Canada. The purpose of these workshops was to provide Canadian farm managers and other interested stakeholders from the agri-food industry with an informed perspective on the benefits of embracing value chain management business approaches.

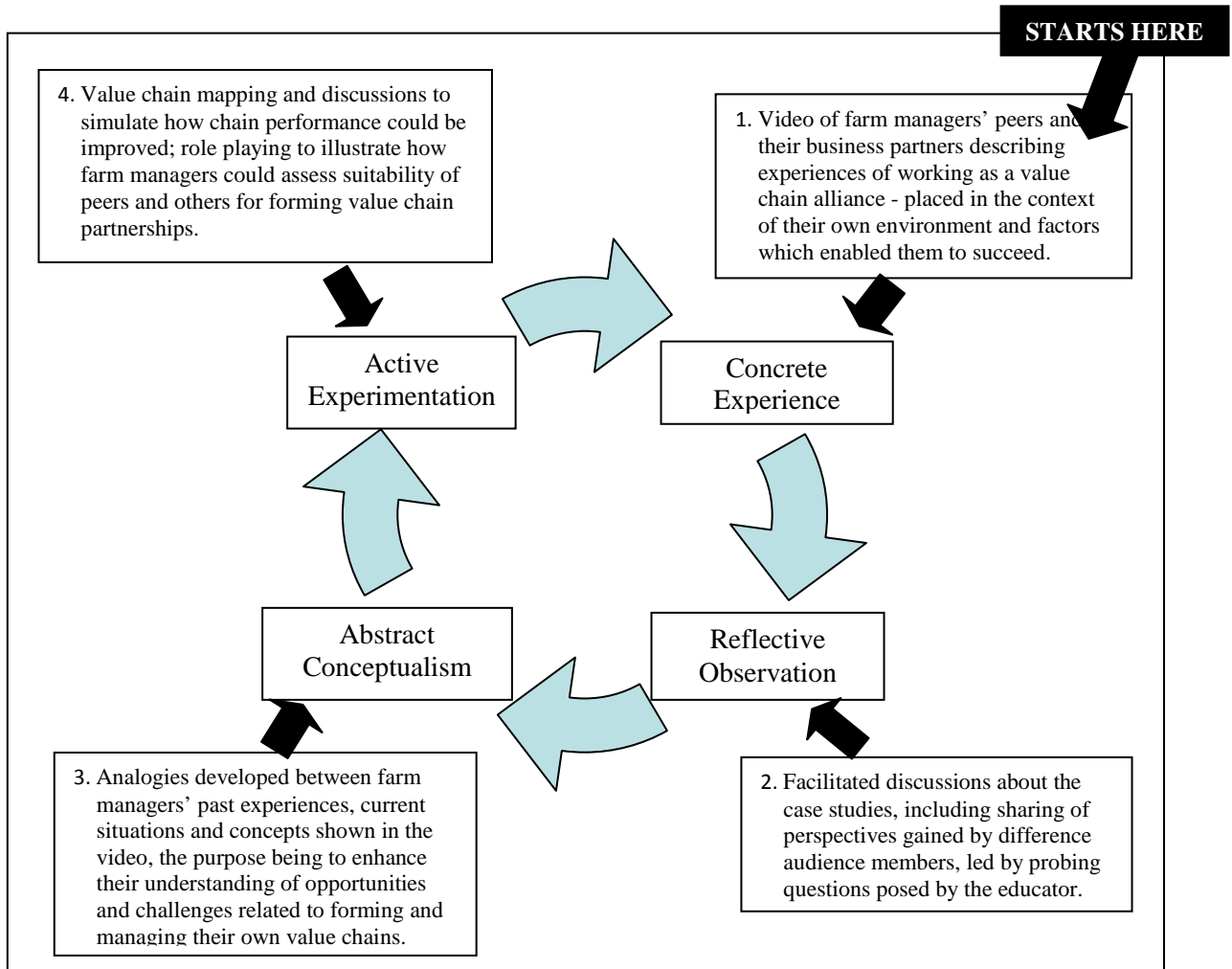
The examples chosen as the basis of the case studies were of closely-aligned chains operating in the UK, Canada, Australia, and New Zealand. Each of the case studies had been operating for a minimum of five years and was deemed to have achieved success. Case studies were chosen to portray how organizations of differing sizes and operating in different sectors had utilized similar principles to achieve successful outcomes.

The one day VCM workshops were delivered between December 2007 and February 2009. Their structure reflected adult learning theory approaches (de Bono, 1999; Jarvis, 2004). After an introduction conveying the topic of VCM and why it was an increasingly important approach for farmers given the rapidly changing business environment in which they operate, the facilitator made a short presentation on the case study that was to be shown. This included describing the main participants and the chain's structure, how the initiative began and some of the challenges it had faced in reaching the stage that participants would see in the video, the core principles around which the chain operated, and the benefits that the participants gained from belonging to that value

chain and therefore served to retain their commitment to it. The 10-12 minute case study video was then shown of the value chain in operation.

Following the video case study, the facilitator guided the participants through an interactive session where they discussed what they had witnessed and their perceptions of how the chain operated compared to their own situations. Then, still using insights from the case study as the backdrop to the discussion, the facilitator encouraged participants to consider how they might benefit from working with other members of their own chains more closely.

Figure 2 How the structure of the workshop reflected the principles of experiential learning.



It was expected that this approach would create an emotional connection between the learner and the subject matter, leading to greater motivation and ability to apply the knowledge that they acquired in their own situation.

**Data Collection**

Gaining insights into how workshop-based learning might have resulted in purposeful changes in individuals’ attitudes and behaviour requires data collection over time. Thus, surveys of participants were undertaken immediately after the workshop, then one year later for those who agreed to follow-up interviews. The objective was to gain insight into why the material or delivery methods worked and for whom, not just if the material and delivery methods worked. In particular, effort was made to identify whether double loop learning had occurred, which could be expected to lead to changes in attitude and potentially changes in behaviour. As the workshop was focused on VCM principles and applications, the expectation was that this could lead participants to developing new

forms of chain-based business relationships than their previous mental models would have supported.

The exit survey assessed the workshop's structure, materials and delivery, and asked whether participants felt they would benefit from the learning experience, and why. A combination of Likert scores and open ended questions was used. A final question asked permission to follow up 12 months later to see whether they had used knowledge acquired from the workshop to make changes in their business practices.

As structured surveys do not allow the researcher to delve deeper into specific areas of interest that may arise during the data collection process (Robson, 2002), semi-structured interviews were used to gather data twelve months after the workshops occurred. This approach is a particularly effective way of exploring issues relating to emotion and personal values while simultaneously ensuring that the research remains focused on the issues being researched (Pawson and Tilley, 2007; Yin, 2002).

A third source of data came from the fact that the workshop facilitator and researcher was the same person. By a process of induction, this resulted in an intimate knowledge of the chain of events that occurred from designing the workshop through to analysing and reporting on the results.

### Results and Discussion

Of the workshop attendees, 279 completed exit surveys. Of these, 108 stated that they were willing to participate in follow-up interviews. After non-responses, the number of follow-up interviews totalled 95, with the average period between the workshop and these interviews being 14 months. Each interview lasted 20 to 90 minutes. Table 1 lists respondents by position in, or supporting, the value chain, showing that 62 out of the 95 (65%) were primary producers.

**Table 1: Survey and Interviews Statistics**

Activity		Number of Participants
Exit surveys		279
Follow-up respondents		95
Follow-up respondents by sector*	Farm managers	62
	Processors	4
	Retailers	3
	Government	13
	Industry org	8
	Other	6
Commercial business operators**		73

\* Some of the follow up respondents were classified under more than one sector.

\*\* Total number of respondents involved in managing commercial businesses.

Responses from the exit surveys and follow-up interviews were coded according to whether the responses reflected factors that, according to adult learning theory, influence the effectiveness of experiential learning or provide evidence of double-loop learning. Further coding identified factors which management theory states are important to successfully managing value chains and influencing changes in organizational behaviour. Coded responses were then analysed to identify themes.

Shown below is a selection of research results indicating whether respondents felt that the workshops resulted in changes, and if so, what those changes were in terms of attitudes and behaviours. A number of quotes are given to illustrate findings as presented in the table.

The majority of respondents stated that what they learned at the workshop led to them changing their attitudes towards their (or their clients’) business, towards other people, or towards both their businesses and other people. In all but one case, the respondents who had changed their attitudes towards others had also changed their attitudes towards their (or their clients’) business. The one exception was a representative of an agricultural industry organization who said that he was “*astonished*” how little some people knew about other parts of the value chain and he was frustrated by a less progressive representative from another agricultural industry organization who was only “*complaining rather than suggesting solutions.*” This statement reflected a common theme: that in encouraging open discussion the workshops led people to identify the characteristics of those with whom they could work to achieve meaningful change. In changing their attitudes towards others and their business, for many respondents this change in attitude led to changes in business behaviour.

**Table 2: Impacts of the Workshops on Participants’ Attitudes and Behaviours**

Impacts	All respondents (n=95)		Farm managers (n=62)	
	Number	%	Number	%
Changed behaviour	71	75	48	77
Did not change behaviour	24	25	14	23
Changed attitudes towards others	65	68	44	71
Changed attitudes towards business	83	90	54	87
Did not change attitude	11	12	8	13

Comments from exit surveys illustrate that workshops led to changes in participants’ perceptions of the world around them, which the adult learning literature describes as the first step in fostering changes in attitude. “*The need to get people who hold different perspectives to work from the same page, which requires leadership, vision, and involvement of the correct people*” and “*That the topic was put in such a distinct way crystallized my thinking.*”

The effectiveness of the video case studies for fostering changes in participants’ perceptions and attitudes was a common theme of the follow-up interviews. “*It was tactile and visual, which has led to me going back to it at times when assessing what decision will lead to what I want to do and why in terms of whether it fits with where we want to go in relation to our long term vision.*” That comment, from a farm manager who since the workshop changed his business plan and increased his profitability, suggests that the power of video case studies came from fostering double-loop learning.

The extent to which the audience, farm managers and others alike, benefited from the case studies being visual is illustrated in Table 3. That fewer respondents enjoyed how the case studies were presented stems from a frustration that some felt towards them not being adequately representative of their industry or personal situation. These respondents connected with the delivery method, though did not make the same connection between the case study and the opportunity to apply what they learned. In general, the responses illustrate the extent to which video case studies are an effective method for conveying factors critical to the success of value chains. These include choosing the correct partners and communicating with other parts of the value chain.

**Table 3: Benefits from Attending the Workshop – Farm Managers’ Perspectives**

Type of Benefit	Farm managers (n=62)	
	Number	%
Saw how I could use the information to improve my business	48	77
Enjoyed how the case studies were presented	48	77
Gave me ideas that I reflected on afterwards	51	82
Learned from seeing how others had benefited from VCM	58	93
Saw the importance of communicating with other links in the chain	57	92
Saw that whether producers can benefit from VCM depends on their attitude	40	64
Gave a new perspective of our business, or how to approach business	47	76

A farm manager who also works for an organization that hosted one of the workshops described how the overall structure led to changes in his and others’ perceptions. *“When you give the PowerPoint to start with, it gives them the background and a better understanding before you go into things in more detail. When they are actively participating there is no doubt that they are learning about ideas and concepts reflected in successful initiatives that they were able to observe through the case studies.”* This is supported by a farm manager who stated *“Seeing and listening to Livestock Marketing was a great motivation to intently learn what and why they were doing and how they were doing it.”*

Table 4 illustrates that in reshaping farm managers’ world views, the knowledge they acquired at the workshops directly led to 72% of them changing their management behaviour. The most common change related to the processes they followed in making management decisions. Benefits that 18 of the farm managers had experienced in the intervening 14 months included access to new markets and increased profitability. One farm manager reported that she had doubled profitability through exploiting a market opportunity which would previously have been refused. In changing how they reasoned, they saw opportunities that they had previously missed.

**Table 4: Forms of Changes Experienced after Attending the Workshop – Farm Managers’ Perspectives**

Forms of Changes	Farm managers (n=45)	
	Number	%
See things differently, so make different management decisions	42	93
Communicate more with people at others levels of the chain	40	88
Have changed the information that I communicate	35	78
Engage more with other levels of chain in decision making process	33	73
More focused on reacting to market opportunities	39	86
Purposely work with specific people / organizations	40	89
Improved processes	29	64
Supply a new market	15	33
Increased margins (profitability)	18	40

A lamb producer stated how their relationship with the processor had improved through purposely focusing on the factors that determined the quality and consistency of their lambs. They achieved this through proactively seeking customer feedback, which enabled them to make more informed business decisions. *“This and the other changes we made led to people phoning us for our lambs, instead of us phoning to see if they will get them. The onus has therefore shifted from the customer making the decision about whether they would accept our lambs, to us making the decision about whether we will accept the customer’s offer.”*

A couple who worked with a processor to market their own and other producers' beef in their retail store and attended the workshop together, recounted how the video had played a primary role in motivating them to utilise different elements from the workshop to improve their operations and their interactions with other chain members. Guided by what they had witnessed about keeping the chain as short and responsive as possible through understanding the end market and making people responsible and accountable, they mapped their chain to identify improvement opportunities. They also identified the product attributes that their consumers valued the most. They enthusiastically recounted how in reducing the number of chain participants, improving processes, setting performance targets, and pricing products according to consumers' perceived value instead of commodity prices, they had transformed an unviable concern into a viable business.

That the workshops did not lead to changes in the attitude and behaviour of more respondents appears to be primarily due to small number of factors. None of the findings refute the claim that workshops reflecting the theory of experiential adult learning are suited to the task of motivating farm managers to acquire value chain management related attitudes and skills. If someone did not change their attitude or behaviour following the workshop, it is most likely due to them feeling that the case studies and subsequent discussions were not sufficiently related to their situation. Hence the effectiveness of the workshops could be strengthened by purposely designing and delivering workshops on a sector by sector basis. This would include using examples that are most relevant to the participants' businesses.

## Conclusion

Experiential workshops structured to reflect adult learning theory and farm managers' preferred learning styles are an effective means of motivating farm managers to learn about skills not traditionally associated with production agriculture, then purposely acting upon their newly acquired knowledge. As suggested by researchers including Kolb (1994) and Jarvis (2004), these results show that changes in behaviour are unlikely to occur without first achieving changes in attitude, which itself results from changes in perspective.

Building on research by Argyris (1985) and Zull (2002) among others, the results also show that the power of video case studies comes from their ability to convey a considerable volume of information in a short period of time, and provide a tangible contextual and visual experience upon which participants can readily reflect. This leads to an emotional bond being formed between the individual and how they can benefit from applying the knowledge acquired, which motivates them to purposely change behaviour. The research also identified that the effectiveness of experiential workshops could be enhanced through targeting specific sectors and audiences.

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