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Tip Sheet: 5 Tips for M&E Culture Change

Monitoring and evaluation (M&E) and data staff in resettlement organizations are responsible for ensuring that team members submit quality data on a timely basis. Your team members may struggle to prioritize data collection and entry while they work to help clients meet their needs. This tip sheet aims to help you create an organizational culture committed to M&E for learning, program improvement, and better outcomes. Understanding the value of the data they collect incentivizes staff to prioritize data collection and can increase their interest in data-driven programming.

Tip 1: Make M&E for learning, improvement, and better outcomes an organizational priority.

- ☐ Get buy-in from leadership within your organization or program.
- ☐ Include M&E in your organization's strategic plan or other documents that outline and guide the direction of your organization.
- ☐ Dedicate resources to delivering on this priority, including hiring a dedicated staff member—or for smaller organizations, identifying an existing staff member—to lead the initiative.
- ☐ Set benchmarks or indicators for how you will measure progress toward being an organization whose culture values data collection and use for learning and improvement.

Tip 2: Clearly and consistently communicate the purpose and value of M&E.

- ☐ Develop talking points that reframe how people speak about monitoring and evaluation. Instead of emphasizing requirements for compliance and donor reporting, try asking: *"What can we learn? How can information gained through M&E help us improve our services?"*
- ☐ Ensure that leaders buy into the message and consistently communicate about it.
- ☐ Help staff at all levels understand why data is collected and how their work contributes to improved programs and outcomes for clients.
- ☐ Use accessible language, such as "information" instead of "data," if needed.

Tip 3: Make sure the data your organization or program collects serves a purpose.

- ☐ Starting during program design, make space for discussion: What do we want to know about this project and why? How will we know if services are not only delivered but are good enough to achieve the client outcomes we want to see? How will we use this information?
- ☐ In M&E plans or indicator matrices, explicitly state how data for each indicator will be used.
- ☐ When planning evaluations:
    - Clearly define evaluation questions and each question’s importance and audience.
    - Outline what data is required to answer each question.
    - Discuss and document how the information will be used and by whom.
    - Where possible, include program staff in evaluation planning to ensure that information collected through the evaluation will be useful to them. At minimum, communicate the purpose of the evaluation, and engage those who will use the information in reflection on the findings.

If the data collected through project M&E doesn't serve a clear programmatic purpose, you aren't likely to get far in your efforts to help team members see its value.

Tip 4: Ensure that staff have clarity around roles and responsibilities—and the skills and resources to fulfill those responsibilities.

- ☐ Address legitimate concerns, like lack of time, real-time data, adequate skills, or financial resources. Work together to develop an action plan to address concerns.
- ☐ Specify responsibilities related to data collection, management, analysis, and reporting, and include these responsibilities in staff job descriptions as appropriate.
- ☐ Map out data-related responsibilities across the team, and share the map. Consider:
    - Which positions are involved in primary data collection? What type of data collection are they responsible for (e.g., attendance tracking), and how often?
    - Which positions are responsible for entering, reviewing, verifying, analyzing, and acting upon aggregate data? How frequently/within what time frames?
    - Which positions are responsible for sharing monitoring data and learning beyond the project team? How frequently/within what time frames?
    - Who is responsible for sharing results with staff who did the primary data collection?

Tip 5: Put in place operational processes and systems needed to instill good M&E practices.

- ☐ During program design, develop theories of change and logframes, identify what you want to learn about your project, and plan how data will be used. *See Switchboard's M&E standards for more.*
- ☐ During program implementation, encourage program teams to schedule regular meetings or establish other processes to regularly analyze data and develop action plans as needed.
- ☐ Put processes and resources in place for teams to conduct end-of-project learning reviews/final evaluations, whether or not a formal external evaluation has been conducted.
- ☐ Integrate M&E-related actions into grant management systems.
- ☐ Develop and introduce accountability mechanisms, such as sharing data with the team on a regular basis, updating clients on program improvements based on their feedback, and/or scheduling team reflections.
- ☐ Invest in data management systems to support real-time or near-real-time data analysis.

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