

Monitoring and reporting

“True genius resides in the capacity for evaluation of uncertain, hazardous, and conflicting information.” Winston Churchill

The big idea

Monitoring and evaluation should be a core element of any business. It is arguably even more crucial during turbulent times when sound decision making is vital and you may need to change direction quickly. It should form an integral part of your strategic planning. Then you can ensure your monitoring systems are developed up front rather than having to think about your effectiveness and performance retrospectively.

Purpose

The purpose of this tool is to allow you to consider the monitoring and reporting needs for your business. A strong monitoring and reporting system will help you to:

- Be clear about what you are trying to achieve and stay on course
- Produce evidence of performance against your stated targets or outcomes
- Recognise interdependencies between projects and business activities
- Remain flexible
- Recognise key decision points
- Communicate evidence-based achievements to stakeholders and beneficiaries

The tool

The tool introduces the six steps involved in setting up a monitoring and evaluation system. Consider the following steps and outline what you already have in place and what you might need to set up:

Steps	Core questions	What your business has in place/needs
Setting up the purpose and scope	Why is a monitoring and evaluation system needed? Is it business-wide, project-based etc?	
Identifying information needs and indicators	What do you need to know to manage your business? Or to manage your projects/services?	

Steps	Core questions	What your business has in place/needs
Planning information gathering and organisation	How do you gather the required information? How do you organise the relevant information? When will the information be collected? Who will carry out and manage the activities?	
Planning for data processing	How do you process the data and produce meaningful results?	

Steps	Core questions	What your business has in place/needs
Planning for quality communication and reporting	<p>How and to whom do you need to communicate the findings?</p> <p>What communication channels are most appropriate?</p> <p>When do you need to be reporting – monthly, quarterly, end of project etc</p>	
Planning critical reflection processes and events	<p>How do you use the information and findings to improve performance?</p>	

Take the next step

Consider the systems that your business currently has in place. How co-ordinated are they? Do you monitor the business as a whole or just individual projects/services/product lines? How timely and accurate is the information your system produces? Have you tended to monitor and evaluate because of stakeholder requirements rather than your own?

Top tips

- Try not to focus solely on quantifiable information collection. Consider qualitative methods too
- Use methods that are appropriate for your business. Your data might include visuals, journals, poems, stories etc depending on what you are evaluating
- Keep the system realistic and linked to your strategy. Beware being drowned by data!