



# ***Te Pūaha Talks***

## **Tools to gather data and capture learning**

Rachael Trotman – 22 September 2022

# Session outline

Impact and spheres of influence

Monitoring, Evaluation, Learning (MEL) – a way to frame what you need to know

The terrain and useful tools for:

- Monitoring (what)
- Evaluation (so what)
- Learning (now what)
- Further resources



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# What are you most wanting help with?



<https://www.menti.com/alpohqm5b3p4>

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You say your program works but why should I believe you?



Because I have evidence.



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Watson, I know what caused the death



But you have only administered a few interviews and gone on two site visits. Should you not collect evidence that is more robust?

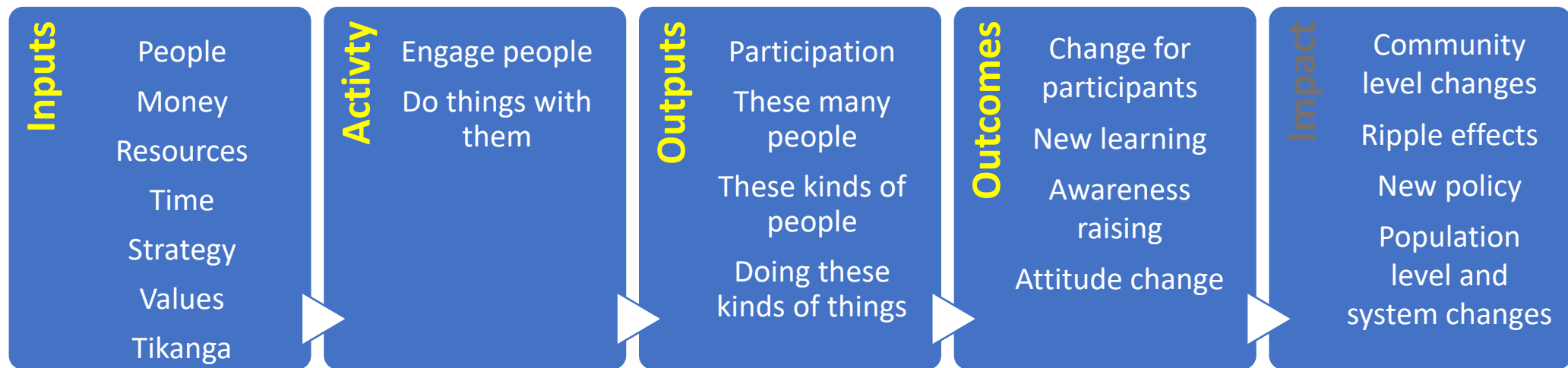


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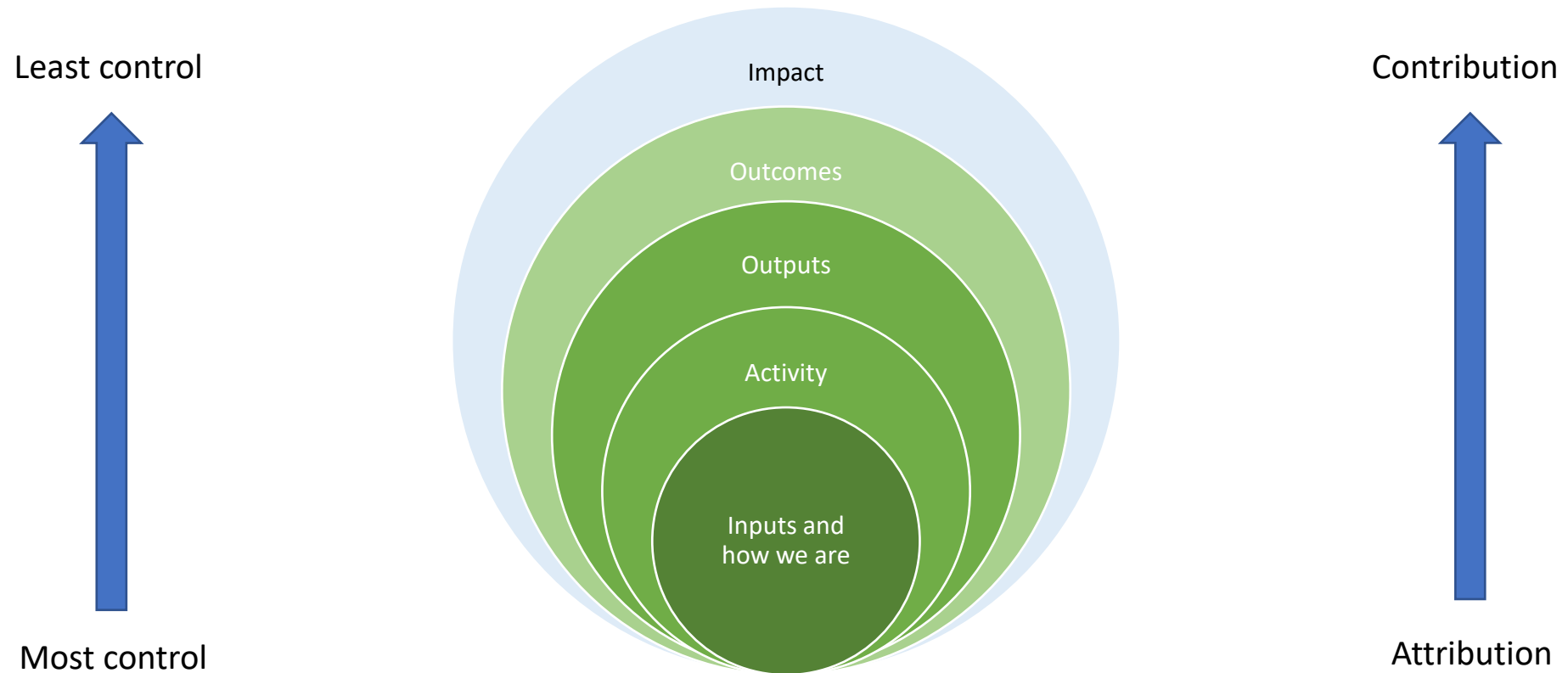
# What do we mean by 'impact'?

'Impact' is often used as a catch-all term for 'the difference we are making'. It is the result of a lot of resource and activity:



Much reporting in the community sector is at this level

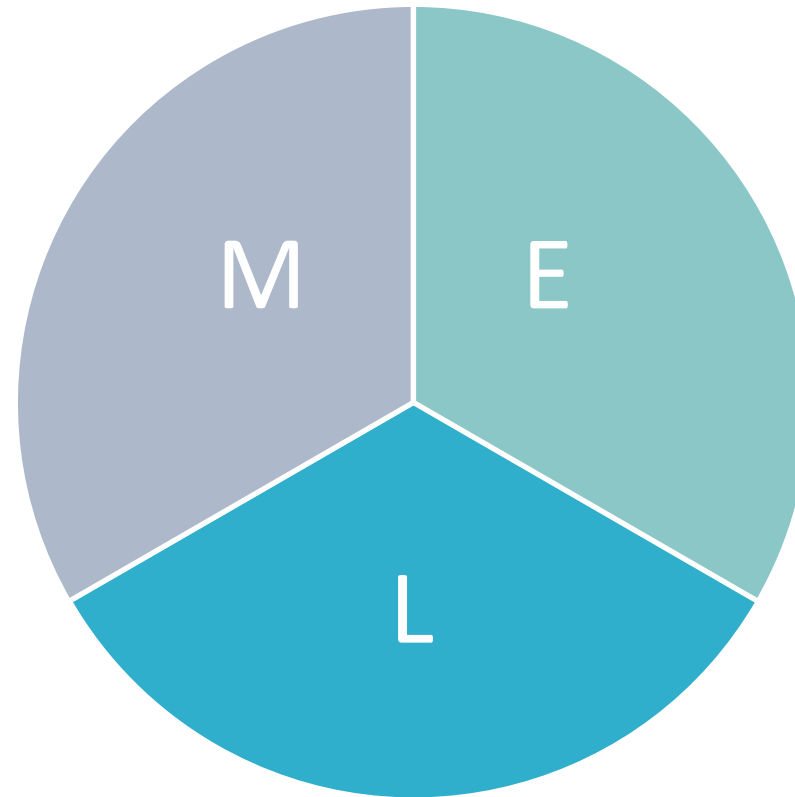
# Spheres of influence and control



# MEL FRAMEWORK

## Monitoring

What are we doing? With whom? How is this changing over time? Is our action aligned with our strategy (or do we need to revise it)?



## Evaluation

So what? To what extent and how are we contributing to our desired outcomes?

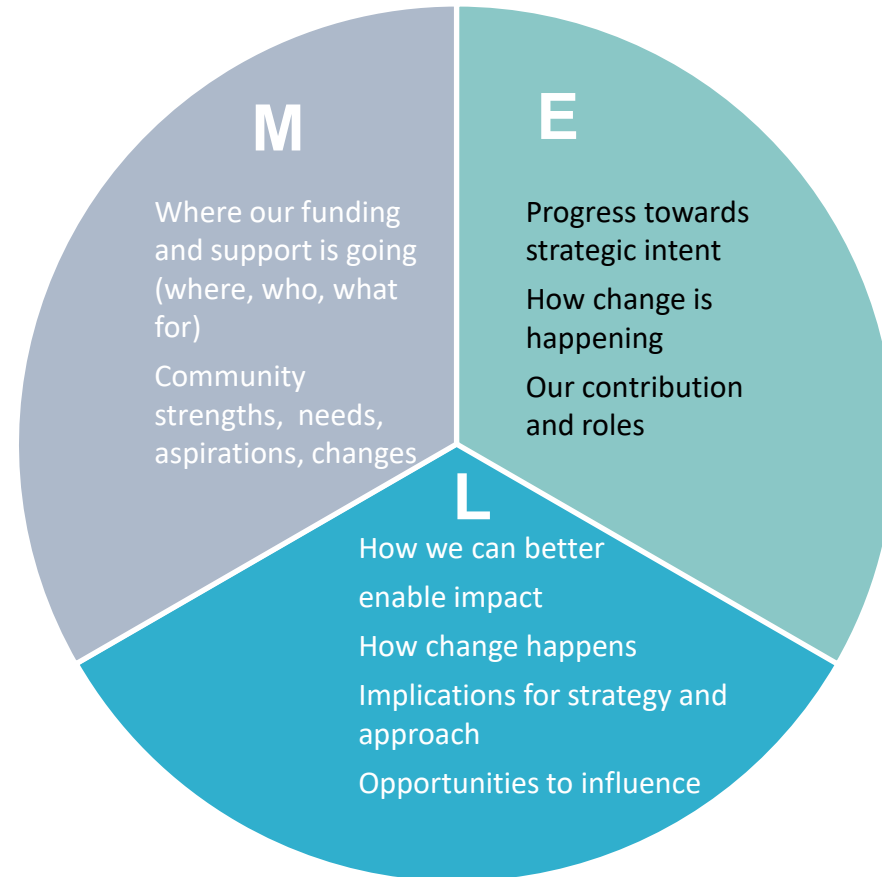
## Learning

Now what? What are we learning about what works, our practice? How can we be more impactful?

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# WHAT DO YOU NEED TO KNOW?

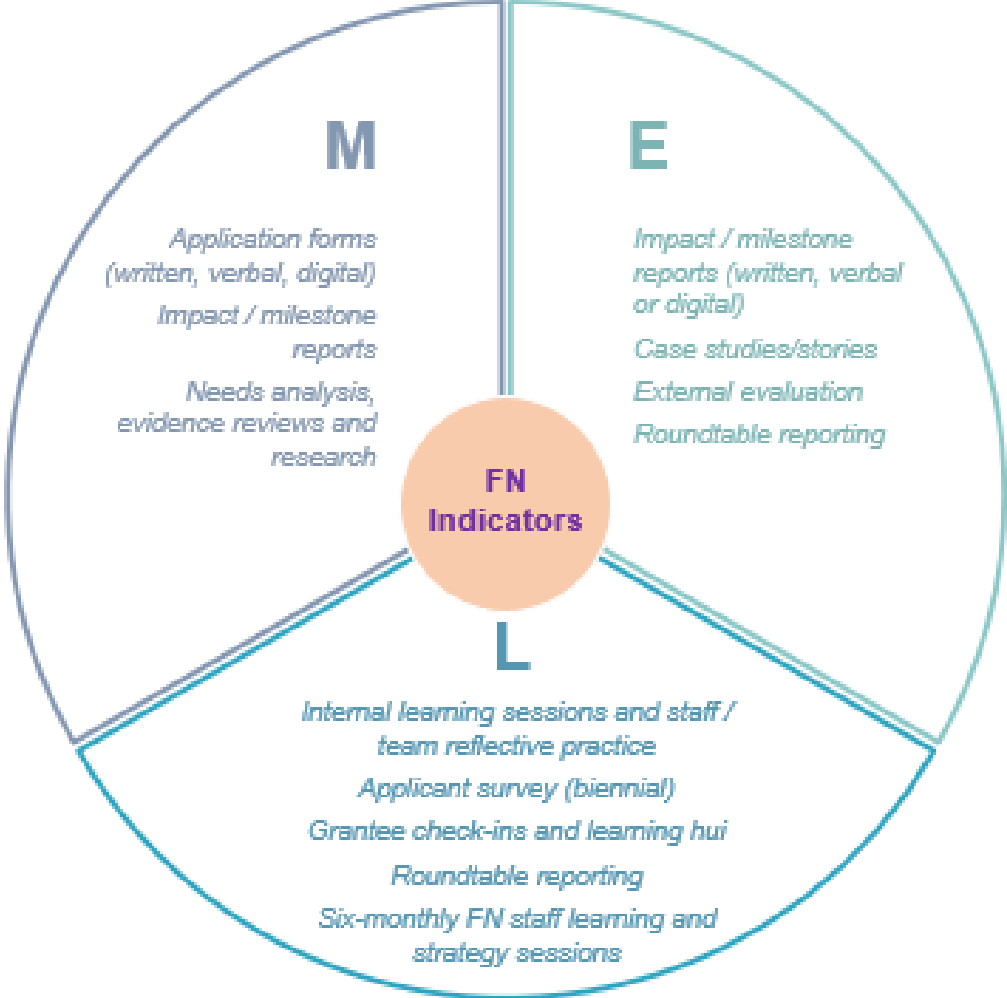
## Foundation North example



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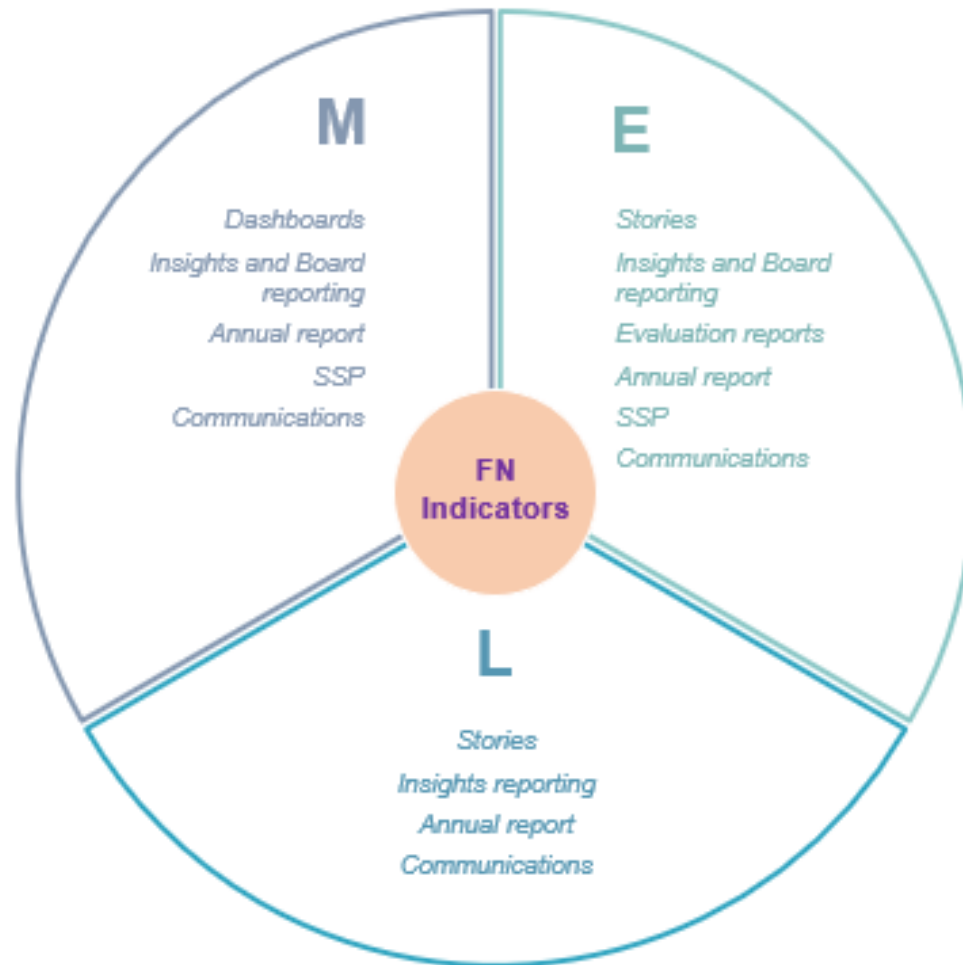


# Identify tools and processes to answer what you need to know



Foundation North example

# How you will report and share findings



Foundation North example

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# A tool that covers a lot of bases

## Regular reflective practice

- Do regular reflection for mahi you need to gather evidence for and learn about.
- Identify how regularly to reflect on what (weekly, fortnightly, monthly), depending on the flow of the work.
- Clarify who needs to be involved outside of team members.
- Document it well in one place (excel spreadsheet, google drive).

# Regular reflection – sample questions

- What did we do? *Core activities*
- With whom? *Be specific: numbers, ages, genders, ethnicities*
- What are we seeing, hearing, feeling?
- What is going well?
- Challenges, surprises, tensions, pivots
- Any changes or outcomes for people/whanau/places/environments? *Include evidence source/s*
- Any system changes or potential? *Use six conditions of systems change lens\*, include evidence source/s*
- What are we learning and sensing?
- What next?

\*Resource flows, policies, practices, relationships/connections, power dynamics, mental models. See [https://www.fsg.org/publications/water\\_of\\_systems\\_change](https://www.fsg.org/publications/water_of_systems_change).

Acknowledgement to The Southern Initiative which developed this practice and questions as part of its Niho Taniwha Framework, see <https://www.centreforsocialimpact.org.nz/knowledge-base/embedding-evaluation-in-your-mahi-the-southern-initiative-s-niho-taniwha-framework?returnUrl=%2Fknowledge-base>.

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# Monitoring – what comes to mind?



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# Monitoring – things to consider

- Identify the most important things to monitor in your space and put effort into capturing those few things well
- It takes discipline and is a shared responsibility
- Do you have someone who likes detail, who has an interest who can hold an overview and chase this kind of data?
- Build in regular reporting mechanisms to embed as a practice (eg to your Board, team or funder)

# Core monitoring data needs

- Basic information about activity:
  - What
  - With whom (how many, demographics)
  - Number of people participating, how often
  - Reach
  - Participation patterns (how it varies over time)
- What are your core monitoring needs? Put any others in the chat

# Some monitoring tools

- Registration information
- Sign-in process
- Record keeping at sessions/events
- Database — Excel, CRMs (Zendesk, Zoho, Hubspot, Freshworks, Record base)
- Door counter



# Evaluation

It's far too complicated to explain, so you'll have to trust me.



But I don't trust you.



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We did it!

We saved the children?

No, 1 million views on YouTube!



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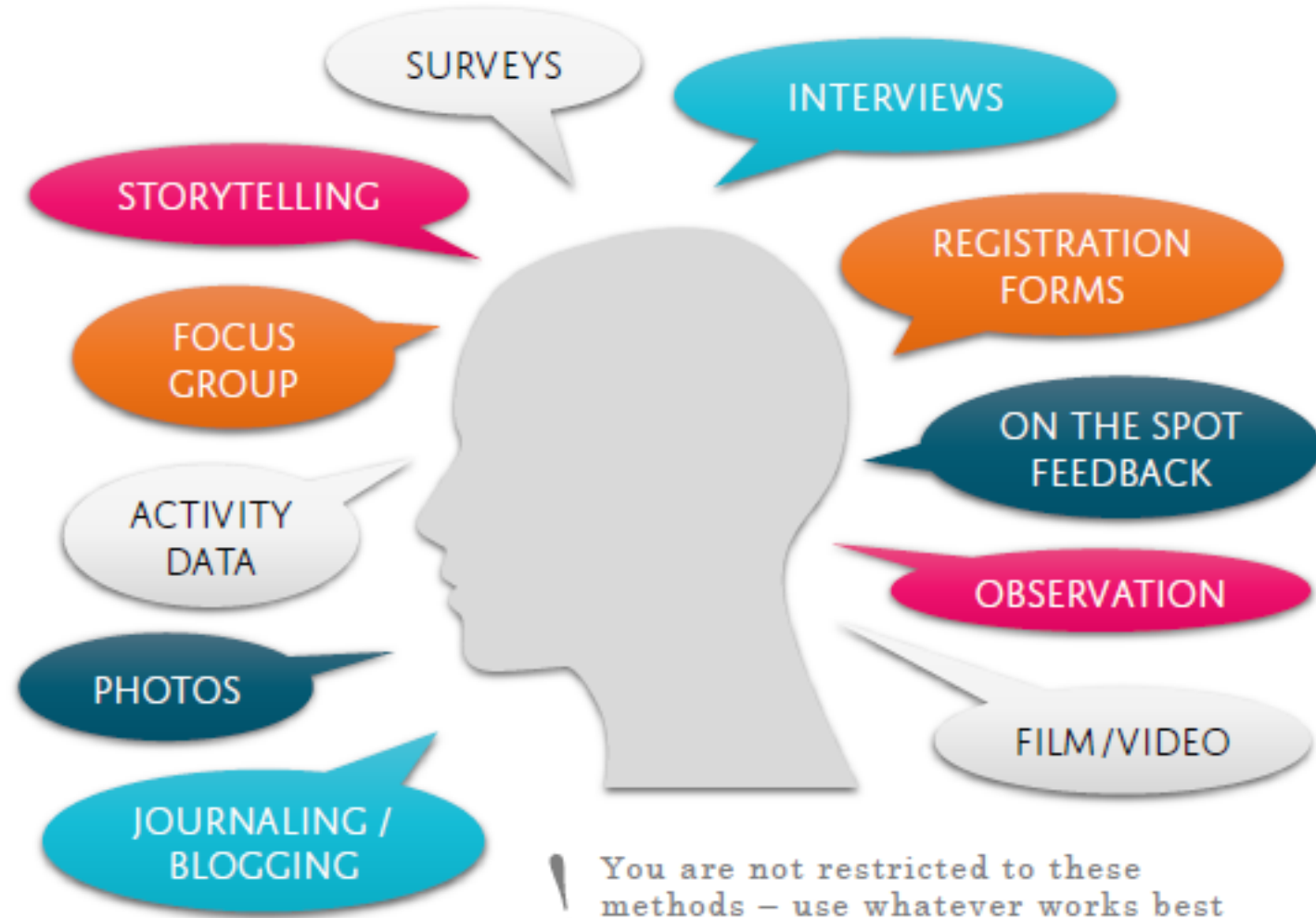
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# Evaluation - so what? Things to consider

Answering the 'so what?' questions requires a range of forms of evidence

It also requires clear questions to answer

Activity data + reflection/learning + horse's mouth feedback =  
A COMPELLING STORY

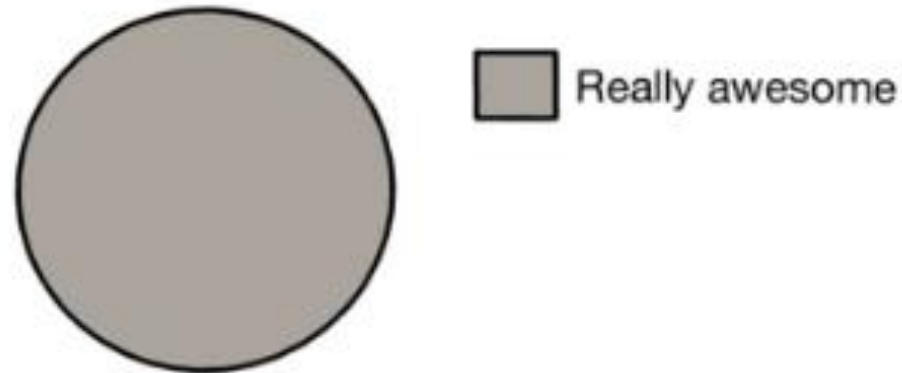


! You are not restricted to these methods – use whatever works best for your community and your project.

# Learning

Write "reports" using "data"

Figure 1. How awesome we are



SOURCE: Because we said so

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# Learning – things to consider

- Operational issues often trump evaluation and learning
- Pausing and making time for regular learning takes leadership commitment and discipline
- It needs to be held and facilitated well (otherwise wastes time and energy and drops off)
- Consider strengths in your team to hold learning space
- It doesn't take long to see the value of learning well together
- It can be transformational for all

# Impact and learning sessions

Collective, well planned and facilitated deep dive sessions, to uncover diverse views on progress, impact and learning.

Involve diverse perspectives, partners, participants.

As far as possible, ask people to evidence their views on progress and outcomes being achieved– how do they know?

Be creative and capture everything well.

# Foundation North example

Six monthly, half day ako sessions with staff (March 2022 patai):

**Thinking about our priority communities and places, what are we seeing, hearing, feeling, noticing?**

**What is going well out there? What has energy and life?**

**What connections are we noticing?**

**What stories are inspiring us?**

**How might we:**

**Grow what is going well, whakamana, accelerate**

**Enable tino rangatiratanga and community-led action**

**Support system level change**

**What could we lean into more?**

**OTHER EXAMPLES OF GOOD LEARNING PROCESSES/PRACTICES TO SHARE?**

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# Summary - MEL framework

| What?  | So what? <b>Based on evidence</b>   | Now what?   |
|--|---|---|
| <ul style="list-style-type: none"><li>• What are we doing/did we do?</li><li>• With whom – be specific?</li><li>• For what purpose/s, what change/outcomes are we seeking (for whom)?</li><li>• What would success or ‘impact’ look like?</li><li>• What do our communities want and need?</li></ul> | <ul style="list-style-type: none"><li>• What happened?</li><li>• What changed, for whom (outcomes, impact)?</li><li>• How well did we do it (quality)?</li><li>• Successes, progress, failures, challenges</li><li>• What made the difference?</li><li>• What have we learned (insight for action)?</li><li>• Recommendations</li></ul> | <ul style="list-style-type: none"><li>• What next?</li><li>• How will we apply findings and learning?</li><li>• What will we do differently?</li><li>• How will we share findings, and with whom?</li></ul> |



# MEL framework – some tools

| What?   | So what? <b>Based on evidence</b>  | Now what?   |
|---|--|---|
| <ul style="list-style-type: none"><li>• Project plan, funding application form: intent, rationale, need, desired outcomes, what impact/success might look like (eg tohu or signs of progress)</li><li>• Ask participants what impact would look like for them</li><li>• Document what, when, who and where (diary)</li><li>• Theory of change<br/><a href="https://whatworks.org.nz/logic-model/">https://whatworks.org.nz/logic-model/</a></li></ul> | <ul style="list-style-type: none"><li>• Regular reflection/shaping sessions</li><li>• Participant feedback</li><li>• Data on impact measures (yours, participants)</li><li>• Learning, synthesis and implications sessions (team and participants as appropriate)</li><li>• A summary/report of findings and implications or recommendations</li></ul> | <ul style="list-style-type: none"><li>• Clarity on who to share findings with and how (including internally)</li><li>• Process to present findings and recommendations</li><li>• Accountability for applying decisions and making changes</li></ul> |

# Further resources

- [www.whatworks.org.nz](http://www.whatworks.org.nz) – Rachael Trotman and Manu Caddie for [Community Research](#)
- Better Evaluation [https://www.betterevaluation.org/en/start\\_here](https://www.betterevaluation.org/en/start_here)
- [Creative and InCredible - 101 Guide to evaluating community-based arts](#) - Rachael Trotman and Amber Walls
- [Community impact toolkit](#) – Point for Auckland Council / Te Kaunihera o Tamaki Makaurau
- <http://www.tamarackcommunity.ca/evaluatingcommunityimpact> (Canada)
- <http://inspiringimpact.org/> - including the Code of Good Impact Practice and tools to help improve your impact practice (UK)
- <http://www.betterevaluation.org/> (International)

What have you found most useful today,  
what will you apply?

<https://www.menti.com/alpohqm5b3p4>



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## Thank you