Getting ready for the assessment
Assessing monitoring, evaluation and learning practices at the project or organisational level requires preparation. You need to gather information on how you do your work and to create spaces for reflection and analysis of this information.

A team effort. Rarely, one person has the complete overview of organisational practices, so we emphasise that assessment is a participatory effort of the whole team.

Preparation is essential. A good preparation is essential to make the most of an assessment exercise. Before starting the assessment, we suggest that you consider the following questions:

What? Is it clear what the assessment is about? What can we expect from this exercise?
It is important all engaged in the assessment understand what it is and that you clarify your individual and organisational expectations. This assessment will help you assess how you evaluate your work and how you learn from it. It will help you to identify your strengths and weaknesses in this area. Please, read carefully the explanations about the scope of the assessment and how it works.

Why? Why should you assess your monitoring, evaluation and learning practice?
You need to clarify your motivation to engage in an assessment exercise. You may be motivated if you:

- Want to understand and explain the impact of your work (to yourself and to others), that is, if you need to answer this question “what does success look like?”
- Want to improve how you monitor and evaluate your work
- Want to assess your knowledge and practice in this area
- Want to strengthen learning throughout your organisation

Who? Who should participate in the assessment?
This assessment is an opportunity for learning for all those involved in the organisation. This includes staff, volunteers, members or supporters and participants or beneficiaries of the organisation’s activities.

One person or a small team can lead the process and involve all stakeholders. They can:

- help explain why it is needed and motivate everyone in the organisation,
- explain what the assessment is about,
- provide any necessary information for those interested to be able to participate meaningfully,
- clarify expectations,
● convene and facilitate a meeting to examine the various aspects of the organisation’s evaluation and learning practice.

The idea is that all those engaged in the organisation’s work could contribute to and benefit from such a learning process. The assessment covers various dimensions or areas of work of the organisation, from its planning and decision-making processes to the management of finances. Though there may be different levels of knowledge and understanding, the idea is to create a space for information sharing and exchange of views. If necessary, an external resource person or experienced evaluator can help clarify concepts and facilitate the process. The advantage is that an external person may not be personally involved and may help keep the reflection process focused.

A quality assessment needs to take into account everyone’s views on the organisational work. If only management or lead staff take part, they may lose important observations and insights. Thus, a participatory process needs to be planned according to the needs and possibilities of the organisation. Often, there are time and financial constraints, but the idea is that everyone is encouraged to share their opinions and learn from the process.

Sometimes it could be challenging to address the problems in an organisation where there a many contrasting needs and expectations from the staff members. It is key to ensure that they all are acknowledged.

How? What methods can you use to organise an assessment process?

You will need methods to:

● **gather information** about how you evaluate your work and about your learning activities. These can be collecting documentation such as evaluation reports or plans of the organisation, interviewing or doing a survey among current and past members of the organisation.

● **share and discuss** experiences and opinions about the current evaluation and learning practices. We suggest participatory facilitated meetings to go through the dimensions and criteria proposed in the assessment. The agenda of the meeting would be basically be drawn from the list of dimensions and criteria proposed by the assessment tool. For example, evaluation at project’s level as a first dimension, with key criteria such as Relevance and Innovation, Planning and Design, etc. Basically, the facilitator would clarify what the dimension refers to and what the criteria means. These are explained in the tool, yet, if necessary, these needs to be further clarified.

● **Optionally, to decide an action plan** to improve your practices.

When? What is the best moment to engage in an assessment process?

Any moment is a good time, but we suggest that you plan assessment activities when most can participate and can dedicate some quality time for it. For example, avoid the period before a big event or when you are too busy. It is hard to make time, but quality time for reflection is an investment to improve the quality of your work.
The decision on when to conduct the assessment will depend on:

- Your motivation and organisational needs
- How in-depth you want the assessment to be
- The kind of information you already have or whether it is necessary to gather documentation and opinions
- Your time availability

It is important to note that there may be several sessions or meetings which can be planned in a longer period of time. Assessment can be part of already planned organisational planning or reflection meetings.

Assessment and learning is an ongoing process. You reflect, adapt, implement, and you repeat this cycle in a number of iterations or rounds.

A quick scan can be done in an afternoon session of three hours or a day, but a more in-depth and participatory organisational assessment may take more time. Often, a process can take up to one or two years if you want to make changes to your practices and monitor their implementation. A timeframe shorter than one year may not be enough for the different strategies and initiatives to be implemented and have a visible effect. In brief, a three-hour sessions may be enough to identify roughly your main strengths and weaknesses. Yet, you need to plan a series of sessions if you want to analyse in more depth your practice and design a strategy to improve your practice.

What are the resources needed/costs involved?

- Printed copies of assessment sheets at the project’s level or/and at the organisational level.
- Access to Internet in case you need to get further information on the topic
- Flipchart paper, post-its and markers, A4 paper, pens.
- Lots of motivation
- Time, at least a three hours session for a first session.
- Space to meet. Ideally, comfortable, with light and no distractions or noise.

Source: CIVICUS Toolkit on Monitoring and Evaluation, Janet Shapiro