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MANAGING TOWARDS CHANGE
– a self-assessment

Strategies, theories of change and corresponding frameworks for Monitoring, Evaluation, Accountability and Learning about results are only useful if we use the data we collect. But how ready are we for that?

Are all staff members aware of how they are supposed to contribute to desired results and new plans? Or do we conduct our work as 'business as usual'? And if we are aware of the ToC and the result framework, are procedures in place that allow thorough data collection and reflections about results? And if procedures are in place, do we trust each other to talk openly about mistakes and difficulties we face during implementation?

MEAL frameworks are only as useful and powerful as the organization's ability to use it. To fully use the data we collect for monitoring, evaluation learning, and accountability organizations and their staff members need to:

- Ensure that their theory of change and result framework is known and understood by all staff members contributing to planned results, so they can compare actual and planned results and learn accordingly.
- Establish and maintain procedures for data collection, reflection and learning, so they have time and space to reflect on the data and their findings, and discuss means to overcome challenges and reinforce drivers that contribute to the results they create.
- Trust each other and feel safe – so staff dare disclosing poor results and discuss openly what they can do to improve performance when they face difficulties in their work.
- Feel accountable to the planned results as a team or an organization - so they are truly interested in helping each other perform as a team.
- Feel committed to deliver on planned results, so decisions and action plans are prioritized and executed.
- Manage conflicts of interest constructively, so conflicts create new knowledge, ideas and commitment to overcome challenges and strengthen or maintain performance.

This self-assessment is meant as a tool for planners and M&E staff to lead internal discussions about the capability of their organization to fully use their MEAL frameworks for learning and accountability. Use the scales below to rank the statements. It is important that you evaluate the statements as honestly as possible without spending too much time before you answer each question.

Grade your answers as follows:

3 points: Most of the time
2 points: Sometimes
1 point: Rarely.

Self-assessment:

How prepared are we to report and manage based on our ToC and the changes/results we make?

1. Result framework	Points
▶ The Theory of Change and results (changes) we plan to achieve are known to all staff members who contribute to achieving planned changes.	
▶ All relevant staff members know how their work is supposed to contribute to planned results and why.	
▶ Our ToC and related results frameworks are described in a document that is accessible to all staff members.	
Total	

2. Procedures for data collection, reflection and learning	Points
▶ Internal procedures, responsibilities, and tools to collect data on the changes we plan to make are in place and implemented.	
▶ Staff who contribute to planned changes participate in regular meetings about changes achieved, how they were achieved, lessons learnt and how findings correspond with our ToC.	
▶ The meetings produce clear decisions and action plans so everyone knows what to do to overcome the challenges that affect our work negatively and learn from our findings.	
Total	

3. Managing disputes	Points
▶ My colleagues are engaged and constructive when we discuss challenges that affect our ability to achieve planned changes.	
▶ The most important – and difficult issues – are openly discussed during staff meetings.	
▶ If we disagree about the way forward, we identify ways to resolve disputes in ways that are accepted by all participants.	
Total	

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4. Joint Commitment	Points
▶ We all know the responsibilities of each other and how each of us contributes to our ToC and planned changes.	
▶ My colleagues care if planned, joint changes outlined in our ToC or LFA are not achieved.	
▶ My colleagues think that the joint achievements of their team are more important than the recognition of their own contribution.	
Total	

5. Accountability	Points
▶ We hold each other accountable when we do not perform or do as agreed and in accordance with our plan.	
▶ We are concerned not to let our colleagues down.	
▶ We discuss each other's individual and joint plans and approaches and how they relate to the joint ToC, constructively and openly.	
Total	

6. Trust	Points
▶ We feel accountable to our team and do not shy away from taking about mistakes or poor performance.	
▶ Staff is not afraid to contribute with their ideas and thoughts about the change we make – or lack of change we see.	
▶ We feel comfortable talking about the challenges and weaknesses in our work.	
Total	

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Total scores (per category)

Add the total points for each category.

➢ A total of 8-9 points indicate that your organization or team is well prepared to report and manage based on your ToC and the changes that you make

➢ A total of 6-7 points indicate that your organization or team have issues that may reduce your ability to report and manage based on your ToC and the changes that you make.

➢ A total of 3-5 points indicate that you need to address issues that hamper your ability to report and manage based on your ToC and the results/changes that you make.

Next steps What are the 3 most important initiatives you can take to improve your organization's ability to report and manage based on results?

1.

2.

3.