



## TOOL | MONITORING COLLABORATION

**TIME REQUIRED:** 5-10 minutes to fill in the monitoring tool and 15 minutes to share back and discuss findings.

**Note:** This activity is most effective when carried out multiple times throughout a collaboration, which allows a team to notice trends in their collaborative process.

Have you ever wondered how you can improve your collaborative work? This tool is designed to help you monitor and assess the quality of collaboration that occurs amongst a group. The use of this tool will encourage participants to reflect on their process and groups dynamics and share perspectives on how to improve their collaboration, which can have a positive impact on the outcomes of such projects.

These perspectives can also offer valuable insight on how to improve project design and functionality. Furthermore, this monitoring effort creates reflective space within a project that allows participants to slow down and thoughtfully consider their approach and efforts.

### USING THIS TOOL WILL HELP YOU DO THE FOLLOWING:

- Invite participants to reflect regularly on their contributions, learning and level of collaboration in a group effort
- Encourage participants to share their diverse perspectives to address a current issue or challenge within the group
- Provide facilitators with valuable input to develop an iterative design process that is shaped by ongoing participant reflection

## CONTEXT

Although they are often used synonymously, *monitoring* and *evaluation* refer to two distinct processes. Monitoring refers to the processes that keep track of ongoing progress, so that corrective action can be taken promptly if a need occurs.

Evaluation refers to the processes that determine whether a project has achieved its intended effect after implementing key activities and practices. When applied in tandem, both monitoring and evaluation processes offer a clear reflection of what an initiative has offered in terms of impact and effort.

### The value of monitoring progress

Monitoring progress is vital because it creates an opportunity to adjust and adapt a plan to ensure project efficacy. When monitoring is done effectively, it will show in the evaluative efforts.

An evaluation, in contrast, is more likely to yield positive and intended results when conscientious monitoring efforts and key adjustments have been made throughout the duration of a project.

## THE TOOL

1. **The Setting:** This tool can be utilized in both virtual and in-person settings. It requires facilitators to create a poll, which should then be shared with all participants. For in-person settings, the poll can be disseminated in analog (paper) or digital formats, depending on the resources available to the group.

For this activity, facilitators can use a variety of polling platforms for participants to record their anonymous answers. Having participants submit their answers anonymously – and making it clear before they start the poll that their name will not be attached to their answers – is a measure that can help encourage respondents to be comfortable being fully honest as they complete the survey portion of the tool.

[Mentimeter](#) is a free and effective online polling tool that can be used to engage participants.

### Monitoring Tool - key questions

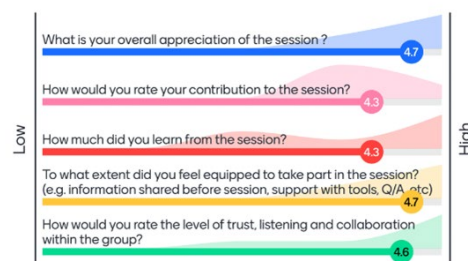


Figure 1: Screenshot from a poll created in Mentimeter, a free online tool to create polls and analyze the results.

- 2. Introduction of Questions:** The facilitator should take some time to introduce the purpose of this activity and introduce each of the questions. See Step 3 for an overview of how to draft relevant monitoring questions for this exercise.

It is important to allocate within a facilitation plan time to introduce the questions so that the entire group has a clear sense of the goals of the activity and what is being asked of them. At this time, participants should be given the space to pose any questions or ask for clarification.

After providing this introduction, the facilitator should then re-share the link to the poll and encourage all participants to complete the questions.

For this process to be effective, it is important that enough time be allocated within a facilitation plan for this monitoring effort. Participants should be able to complete the polling activity within the session or shortly after.

- 3. Monitoring Questions:** The questions should prompt participants to reflect on their contributions and their shared progress as a group. Additionally, the questions should also give participants the space to share how they feel about participating in the group environment. This is an important opportunity for participants to anonymously highlight any areas of concerns, so that the facilitators can promptly and effectively make the appropriate adjustments.

## SAMPLE MONITORING QUESTIONS

Below are examples of questions that can be used to monitor collaboration and group dynamics:

- What is your overall appreciation of the session?
- How would you rate your contribution to the session?
- How much did you learn from the session?
- To what extent did you feel equipped to take part in these sessions? (e.g., information shared before the session, support with tools, Q&A, etc.)
- How would you rate the level of trust, listening and collaboration within the group during this session?

4. **Sharing the Results:** Once the group has completed all the questions, it is important to share back the results during the next group session. This serves as an opportunity for the group to collectively reflect on their answers and address any emergent questions or concerns. It is also important to give the group space to make observations and interpret the results of the monitoring effort. To encourage such reflection, facilitators can prompt participants to consider questions such as:
- What do you observe?
  - How can we explain these results?
  - How do these results compare to the results from our last session?
  - Are there any significant changes?

It is helpful when the tool functionality shows the extent to which there was convergence or a lack of convergence amongst the answers, as this helps to provoke reflective dialogue within the group.

5. **Analyzing Trends Over Time:** Using the information pulled from the participants' responses, it is important to periodically analyze for trends. This data serves as an effective indicator of the group's evolution and growth.

The results can be used to understand the strengths and/or weaknesses of a group, and can also allow for adjustments to be made in real time. This responsive approach makes it possible to create a process that is truly reflective and iterative.

## PRINCIPLES FOR USING THIS TOOL

We recommend keeping the following principles in mind when using this tool:

**Foster a Reflective and Reflexive Environment:** It is important to create an environment where participants feel as though they can candidly share their thoughts and feelings on their individual process, the group's shared progress and the level of collaboration occurring within the group. Having participants submit their answers and reflections anonymously can contribute to this sense of safety.

**Be Open to the Process:** A key element of this process is being open to the evolution of answers and this requires being open to a certain level of inaccuracy in the results. Certain

changes (such as absences or changes in the number of participants) may affect the results. Nonetheless, the long-term, longitudinal trends will still be accurate and helpful.

**Using Tools that Evoke Interest and Curiosity:** It is helpful to use a polling application (such as Mentimeter) that allows results to be shown to the group in a dynamic manner. This is important because it creates a sense of interest and curiosity amongst the group, which can help generate productive dialogue on the topic of collaboration and group dynamics. Additionally, a sense of shared responsibility is fostered when these results are made visible, as the group becomes more cognizant of how their contributions are affecting their peers.

## DIVING DEEPER: THE TOOL IN ACTION

[Tamarack's participatory grantmaking pilot project](#) utilized this monitoring tool to assess the project's ongoing level of contribution and collaboration. A key component to this pilot project was a People's Panel comprising members of Ontario's Peel Region, where the pilot was taking place.

The People's Panel, with support from the Tamarack Institute, were tasked with developing a Peel-specific funding opportunity that would fund projects aiming to build equitable economies for immigrants and refugees within the Peel Region. The Panel engaged in numerous co-design sessions and worked together to create the final funding opportunity.

Tamarack made a concerted effort to monitor the group's ongoing level of collaboration. At the end of each session, Tamarack posed five reflective questions/prompts and gave participants the space to answer them. This exercise gave participants the opportunity to highlight their appreciation for the process and their ongoing group-work – and it also offered the opportunity to raise any concerns.

Through this effort, this project was able to incorporate an adaptable dimension as changes were made on an ongoing basis to reflect the Panel's input. This ongoing effort to monitor progress and address emergent needs/concerns through adjustments was important as it



**We went from a collaborative group to a participatory group. It is because we had that common ground and trust.**



*– Observation from a member of the People's Panel in the Tamarack Institute's participatory grantmaking pilot project, collected through a monitoring effort*

ensured the project yielded its intended results.

## ADDITIONAL RESOURCES

- [CASE STUDY | Participatory Grantmaking in the Peel Region](#)
- [ARTICLE | “I felt the power, I felt the fire”: Empowering Newcomers to the Peel Region Through Participatory Grantmaking](#)
- [WEBINAR RECORDING | Centering Lived Experience Through Participatory Grantmaking](#)