



## Indicator Workshop

*A guide for creating your own indicators*

This section is designed to help you create a list of indicators for your group. These indicators will help you assess the progress that your projects are making. This workshop will take you through a step-by-step process to develop a list of good indicators, test them out, evaluate their quality and determine whether your group has the capability to collect the required data. This workshop has been designed around the worksheets found at the end of this section. Use them to guide you through the process. **This is only a guide. Feel free to change it however you see fit based on what you think will work best for your group.**

- **How to get started:** It often works best if you start with a small group (five to ten) of active members within your organization. You could proceed with this small group or you may want to include all members of your group from the start. Do whatever you think will work best for your group.
- **Scheduling:** You will probably need to schedule at least two sessions. The workshop is designed in six major steps. Schedule the meetings however they will work best for your group. The first four steps can easily be finished in one long session. At this point, you will have a list of indicators and a schedule for collecting data. The fifth and sixth steps, during which you will evaluate your initial list, require a break and at least one additional session. If you want to avoid long sessions, there are obvious ending points throughout the workshop. Regardless of how you schedule the sessions, it is important that you dedicate yourself to the process and complete it in a timely manner.
- **The follow-up:** Keep the process going after the initial workshop sessions. Create a schedule for data collection and then meet again to re-evaluate your indicators. When you go to collect your baseline data, you may find that you have selected all the right indicators or you may find that some indicators are less suitable than you first thought. This might be because they do not provide meaningful information, or maybe the required data is just too hard to collect. The follow-up will help you evaluate your indicators and make any necessary changes.

## BEFORE YOU BEGIN: THE GROUND RULES

- Know your goals
- Know your capabilities and capacity
- Know your projects (current and potential)

The information required by these rules will give you a solid foundation from which to proceed. A clear understanding of goals will help you to choose indicators that will be appropriate for your community. Knowing what your members can accomplish will help you select realistic indicators. Current and potential projects can often point out indicators that will be helpful to collect.



## STEP 1: BRAINSTORMING SESSION

### 1. Start Brainstorming

- Be creative
- The more ideas the better
- There are no bad ideas
- Have an open mind

**Possible  
Indicator Types**

- Environmental
- Economic
- Social
- Organizational

Hold a brainstorming session to begin the process. This meeting could include community members, members of the organization or maybe just the board of directors. Get everyone together and just start throwing out ideas for possible indicators and write them down. There are no bad ideas or wrong answers during this section. Build off of each other's ideas. One person should be in charge of keeping the meeting focused on the task at hand, and one person should act as secretary and record all the ideas as they are presented. An open mind is essential in this type of exercise, something that may seem crazy at first might turn into a great indicator after everyone starts talking about it.

Make several copies of the Brainstorming Worksheet and write a goal, objective, or project (choose whichever is most appropriate for your group) at the top of each sheet. Then brainstorm indicators for each goal, objective, or project.



## STEP 2: EVALUATE INDICATORS

### 1. Narrow Down the List

- Be realistic - keep the ground rules in mind

Make some determinations about which indicators on your brainstormed list: 1) will properly demonstrate the progress that your group is making; and 2) are within the technical and financial capabilities of your group. This is not your final list. Next you will use the Indicator Worksheets to help evaluate each individual indicator with an eye towards creating a final list.

### 2. Complete the Indicator Evaluation Worksheet

Use the Indicator Evaluation Worksheet to begin evaluating the usefulness and effectiveness of each indicator from your refined list. Note that it is important to move past abstract definitions of indicators towards the specific method that you will use to measure them. Fill out one worksheet for each indicator. The PROCESS section of the Indicator Evaluation Worksheet is particularly important in evaluating whether or not your group will be able to collect the data for each individual indicator. If there is a question in this section that you cannot adequately answer, it is likely that your group will not be able to effectively use this indicator.

#### Organizing Strategies

- Goals
- Objectives
- Projects
- Indicator Types



# Indicator Evaluation Worksheet

## Indicator Type

Check off all that apply

- Environmental
- Economic
- Social
- Organizational
- Other

**INDICATOR:** List one \_\_\_\_\_

*Describe the indicator and measurements required.*

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## **GOAL(S)/OBJECTIVE(S)/PROJECT(S):**

*List the goal(s)/objective(s)/project(s) the indicator will be measuring progress toward.*

*Is the collection of data for the indicator related to a specific project?*

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**PROCESS:** *Describe how data will be collected.*

*Who will measure it?* \_\_\_\_\_

*Where will the data come from?* \_\_\_\_\_

*How often does it need to be measured?* \_\_\_\_\_

*What special equipment/knowledge/skills are required?* \_\_\_\_\_

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*Are the needed equipment/knowledge/skills available to your group?*

**CHECKLIST:** *Is it a good indicator? Under each category describe how the indicator was rated (see manual for a detailed discussion on each characteristic).*

Relevant to Project

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Understandable

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Easily Used

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Provides Reliable Information

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**NOTES:** *Additional instructions or notes on data collection.*

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### **STEP 3: FILL OUT THE INDICATOR LIST EVALUATION WORKSHEET**

Use the individual Indicator Worksheets that you have filled out to decide which indicators you want to include in your final list. Each indicator that you choose should provide useful information. Each should be within your group's capabilities to collect data. Write the list of indicators down. At this point, it is probably better to include too many than too few, as you will have the chance to refine the list later.

Use the CHECKLIST at the bottom of the worksheet to guide a discussion of your list of indicators as a whole. These questions are intended only as guides. If they apply to your group, use them. If not, don't use them. For instance, it might not be important or feasible for your group to collect data related to all of your goals. However, you should probably try and touch on as many as possible. As for the range of difficulty question, you certainly do not want to create a situation where data collection is extremely difficult for your group to maintain. However, you might also look at this as an opportunity to increase the capabilities of your group by choosing one or two indicators that are more challenging.





## **STEP 4: FILL OUT THE INDICATOR SCHEDULE AND ASSIGNMENT WORKSHEET**

After you have determined the final list of indicators, it is now time to put them into action. Use the Indicator Schedule and Assignment Worksheet to set a realistic time frame for data collection and assign a person or group to be responsible to collect, record and report the data. Now you are ready to start collecting data!



## **STEP 5: COLLECT DATA**

### **1. Collect Baseline Data for Each Indicator**

Everyone that is responsible for collecting baseline data should go out and do it. If you are doing the workshop in one day or over a weekend, collect as much of the data as possible. If you are doing the workshop over a longer period of time, try to follow your schedule as closely as possible.

### **2. Fill Out the Data Collection Worksheet**

Everyone responsible for collecting data should fill out a Baseline Data Collection Worksheet for each indicator. Use this information to evaluate your schedule. Is it realistic?



# Baseline Data Collection Worksheet

## INDICATOR:

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## BASELINE DATA COLLECTION PROCESS:

*Was the data existing or new?* \_\_\_\_\_

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*How long did it take to collect?* \_\_\_\_\_

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*Describe the collection process:* \_\_\_\_\_

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## EVALUATE THE PROCESS:

*Is the collected data useful?* \_\_\_\_\_

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*Could it provide evidence of the success of your group's efforts?*

*Does it relate to a goal?*

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*Are you confident that the data is correct?*

Yes

No (Explain)

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*In what way will the data help your group in future decision making?*

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## STEP 6: FOLLOW-UP AND EVALUATE

### 1. Get back together and review all of the worksheets

When you go to collect your baseline data, you may find that you have selected all the right indicators or you may find that some indicators are less suitable than you first thought. This might be because they do not provide meaningful information, or it may be because the required data is too hard to collect. The follow-up will help you evaluate your indicators and make any necessary changes.



It is important to return and meet as a group to review the list of indicators that you have created after you have begun to collect data. Go back over the worksheets that you filled out and review the answers using the experience that you have gained. Have any of the answers that you originally gave changed dramatically? It is probably not necessary to go through each worksheet systematically, although this may be a good approach. Do the experiences gained in collecting the data change your overall feeling about your list of indicators?

### 2. What if the indicators aren't working?

Don't worry. This process can be difficult. Take what you have learned from the process of trying to collect data and completing the worksheets. You may choose to modify the indicators that you have selected or review other indicators that you originally had on your brainstorming sheets and select new indicators to use.

### 3. We have a list of good indicators, what now?

First of all, congratulations. Good indicators can be a powerful tool for your group. In order to make them as useful as possible you can do two important things:

- **Record the data in a useful format.** Now that you have a tool to demonstrate your success, you want to have it handy when you need it. This could mean doing something as simple as having everyone write down their data on a piece of posterboard as they collect it, or someone could electronically enter the data. No matter how you approach recording the data, it is important to have your information in one central location. This should include all of the information collected from the baseline to the most recent data. This way, you will always be ready to present the data to your group or other interested parties.
- **Don't be afraid to update the list.** As your group changes over time, it is likely that you may need to change the indicators that you use as well. This does not mean that the indicators should become the major focus of your group. Once an initial list has been established, take a look at it every now and then and make sure that it still makes sense. In some cases, the data might not show any changes over time. In others, the direction of your group may have changed sufficiently to require that you tweak the list to maintain its effectiveness.