

**MAKING THE M&E<sup>1</sup> GAME WORTH THE CANDLE:  
How Skillful Facilitation of Staff Engagement Can  
Unlock the Benefits of Systematic Evaluation Practice**  
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As the [New Israel Fund](#) has continued investing in developing internal capacities as a learning organization, our sustained efforts to create and more systematically use M&E tools for managing well and increasing impact are starting to generate observable, positive and meaningful outcomes. But we couldn't have realized these encouraging early successes had we not found a new way to overcome some hardcore – but not entirely unexpected – staff resistance.

Not for nothing, of course. Both field and office staff, including resource development professionals, have reasons to be ambivalent about roles and responsibilities for internalizing M&E practice into their organization's daily program operations, management and fundraising. All such projects require scarce material resources (money, models, technology) to facilitate the difficult process of managing internal change, ambitious projects often fall short of their goals, and Israel has faced dramatic external realities over these years (multiple elections and COVID-19, to name just two) that justify further caution. So it's not entirely unreasonable for non-M&E professionals to worry that "the game is not worth the candle."<sup>2</sup>

Management can't force the kind of participatory energy that comes from true staff buy-in. If they doubt that the M&E game is worth the candle required, no one will choose to play. Unless legitimate questions are answered and exaggerated fears are allayed, real progress won't happen and staff, organizations, and their funders won't ever see the very real benefits of systematic evaluation practice.

This post explores how the authors struggled to understand if and how NIF's Resource Development Department might benefit from a better understanding and greater employment of M&E. The process eventually resulted in a mutually-beneficial solution and a new model, which helps to replace old feelings of tired, sinking dread with cautious curiosity (dare we say enthusiasm), and the routine exercise of operationalizing M&E theory no longer seems insurmountable.

We then present our new framework based on a triage model, used to align M&E objectives across the organization, including calibrating the level and types of staff capacities required to face existing M&E challenges. Skilled facilitation – such as team orientation to the basics of social change evaluation, weekly M&E "clinics" for on-going staff development, and ad-hoc consultation – turns out to be the magic fairy dust that makes the entire process less intimidating and overwhelming, enabling staff fluency and practice of the basic use of evaluation language and tools, as a daily management tool. We end with practical

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<sup>1</sup> Measurement/Monitoring and Evaluation.

<sup>2</sup> "In the days of candlelight illumination, ['the game is not worth the candle'] literally meant that the card game being played was not worth the cost of the candles used to light the proceedings." *The Dictionary of Clichés* (2013). Retrieved January 11 2021 from <https://idioms.thefreedictionary.com/The+game+is+not+worth+the+candle>.

applications of the triage framework to increase buy-in among all staff and across other internal and external stakeholders, including funders.

## **THE CONFLICT**

What began as a lukewarm exchange of ideas about how to work together led, after some give and take, to rising tensions between us. In a brainstorming exercise for this article, Shira recalled asking herself such basic questions as “Who is this person and why is she asking me and my staff to do evaluation?”

*As resource development people, it is our job is to report out what the field brings us. While it is true that we are the public face representing and marketing the field, we simply need and expect them to weave the stories together and to bring us the facts and figures. Under even the best of circumstances, asking people to self-evaluate is intimidating and even scary! During these especially challenging days it is overwhelming and it seems like too much effort, when all I expect to see is what I already know - that we could be doing better. So why should I spend time on that!?! It looks like Mt. Everest and even experienced hikers have trouble with Mt. Everest! You are asking me – in the midst of everything else I'm carrying on my back – to hike under unreasonable conditions. I need time to acclimate to this new way of breathing.*

Unsurprisingly, Jenny had a rather different view of the situation:

*I know evaluation is hard, but come on! This is so NOT rocket science! You and I both know that since the beginning of time, change makers have benefited from self-reflection and data analysis, and we also both know how much your particular staff will appreciate being asked their opinions about how things are going. They are smart professionals, and they don't "just" want to write up others' news and/or serve as glorified "google translate" for what others tell them – they also want to use their brains and critical thinking skills. I know you need me to increase the supply side (from the field) – and I'm working on that - but don't you see that you can also contribute here by creating some demand?*

## **THE ROLE OF KINDNESS AND CREATIVITY**

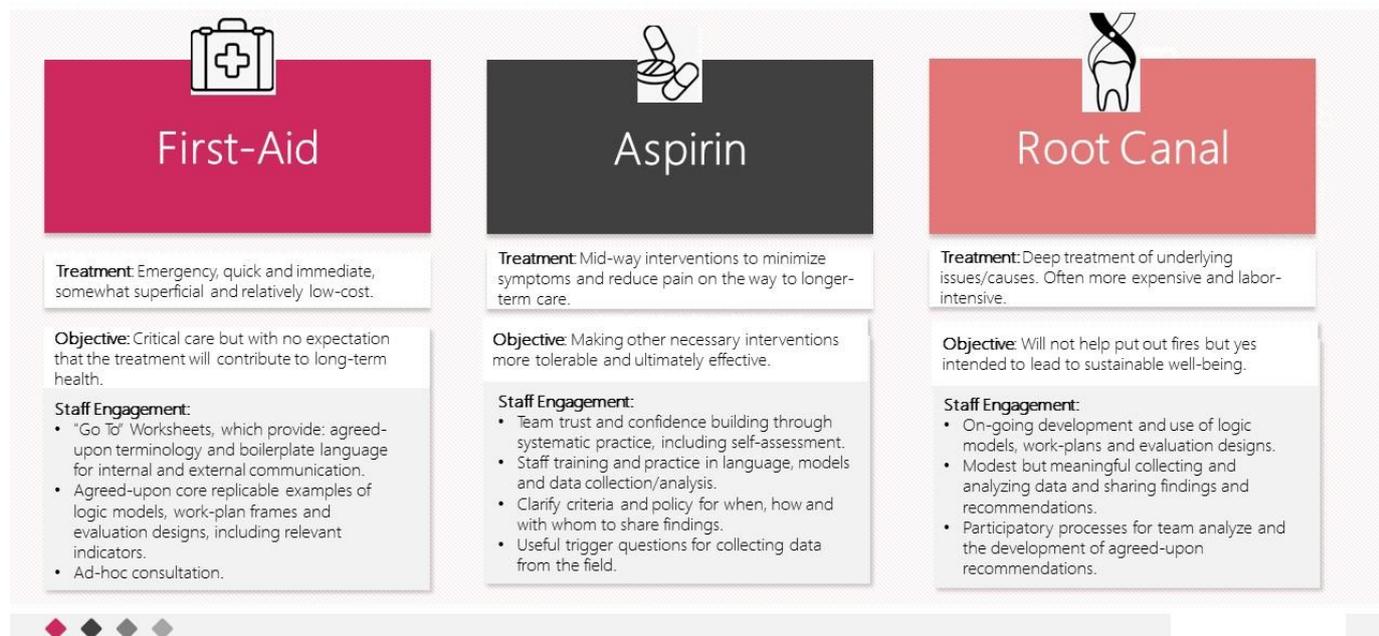
It shouldn't be overlooked that the key to breaking their deadlock was a mutual appreciation of each other's efforts to find consensus on the right amount and type of investment needed to ensure sustainable transformation. Without that, the work would surely have floundered. Shira reported appreciating that Jenny didn't "give in to (her) paralysis...you didn't throw your hands up". Jenny shared her own respect, that Shira was open to hearing how learning and evaluation capacity-building could be meaningful for her team. It was only after productive negotiations ensued that a new framework for evaluation treatment ultimately emerged.

## THE TRIAGE MODEL FOR SKILLFUL FACILITATION OF STAFF ENGAGEMENT

M&E management tools don't come in a box with instructions; every project is bespoke (albeit with recognized professional practices) because every organization and team has different M&E needs and resources. If you want to summit Mt. Everest, you first have to agree on how to get there, and then it is best to start in the foothills.

Since most of us aren't actually traveling to Nepal (especially these days), a more familiar analogy might be three different treatments for a toothache. Maybe you just need first-aid for a sore gum, or an aspirin if it really hurts or a fever persists. You don't get a root canal until the dentist, using diverse professional diagnostics, says you need one.

## M&E TRIAGE MODEL



## PUTTING THE FRAMEWORK INTO PRACTICE

Our framework includes both the triage model and the facilitation needed to skillfully engage staff in its implementation. The shared objective is developing M&E fluency commensurate with the organization's needs and resources so that stakeholders across and outside the organization come to believe that the potential benefits are worth the effort required.

Over the past year, NIF has continued to employ this approach. The authors of this piece and our colleagues have reported that, even while some challenges still exist, the benefits of systematic evaluative practice are increasingly apparent.

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## **THE END**

Of course this isn't the end...as monitoring and evaluation is a spiral process, where the learnings and recommendations inevitably bring us back to the beginning, sharpening our planning capacities and overall strategies. And on the way, hopefully, the relationships we build and nurture support learning, that while at times exhausting can eventually lessen the sting (first-aid), alleviate the pressure (aspirin) and fix the core problem (root canal).

### **Some Other Findings and Replicable Tools**

Some indicators of increased staff buy-in include:

- Increased willingness to engage in participatory exercises for creating and analyzing theories of change and their embedded progress indicators;
- Increased openness to more regular practice of collecting and considering data from diverse data sources, in program and funding decision-making processes;
- Individuals calling out, at the beginnings of conversations, especially planning meetings, to ask "wait! what are our goals here?";
- Other self-reporting by programmers that they feel less overwhelmed and nervous in anticipation of quarterly progress check-ins;
- Grant-writers' reporting that the quality of the plans and progress reports is more strategic (with stronger links between activities and benchmark outcomes); and
- Staff is in general more curious about, including even taking initial initiative on systematic evaluation exercises, including post-activity surveys, interviews and targeted observations.

It bears repeating that it is always inappropriate for evaluation or resource development people to define program goals and/or indicators alone. They can be partners in the process but only when direct field partners take the lead.

We also believe the model is potentially useful for philanthropy professionals interested in increasing their own capacities for using M&E to enhance fundraising and/or grant-making management and ultimate impact. We suggest focusing on *accountability*, based on the five primary places wherein M&E is useful for identifying and maximizing sustainable social change impact:

1. On the personal level, this work surfaces findings that can inspire and reassure individuals on the front lines by seeing and knowing how and where their work matters.
2. On the team level, this work helps clarify expectations and agreement about where we are heading, and improves communication, efficiency and effectiveness.
3. On the level of the actual work, M&E helps tighten the project's strategy, confirm alignment between activities and expected outcomes, and identify best practices.
4. On the level of the organization, M&E helps to establish and maintain relationships with external stakeholders (partners and/or donors), including identifying places of contribution and attribution, especially useful when there are multiple players in a particular field.

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5. Related to the above, identifying and explaining social change impact can help in the third sector in general through widening the body of available theories and practices that are relevant beyond an individual organization or project.

**Other related and practical tools (in Hebrew and Arabic) can be found [here](#).**