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## Tips for trainers: Introducing the 'H-form' - a method for monitoring and evaluation

### Introduction

Working in 1997 for IUCN with Veronica Muthui in Somalia, Andy Inglis developed a method to assist local people to monitor and evaluate local environmental management. He called this the 'H-Form' or 'Rugby Post form'. Since then it has been modified in other monitoring and evaluation exercises in Scotland, Wales, Austria, Northern Ireland, Egypt, England, India and Romania.

### Examples of applications

- To assist local people to evaluate the performance of partnerships, programmes, agencies, initiatives, and a range of social and environmental topics;
- To identify local indicators for ongoing monitoring and evaluation;
- To assist agency staff to evaluate and monitor their activities related to smallholder farming, forestry, fisheries, public consultation process, etc.;
- To assist participatory appraisal (PA) workshop participants to evaluate their training and scenarios of good and bad practice for engaging with people; and,
- to facilitate and record semi-structured interviews with individuals and or groups of people young and old.

### Materials

A large piece of paper (e.g. flipchart paper if working with a group, or smaller if working with an individual), enough markers so that everyone in the group has one each, and post-it notes<sup>1</sup> (about 12 per group member).

<sup>1</sup> 'Post-its' are small, self-adhesive pieces of paper, which are easy to stick on to charts. If they are not available, pieces of paper can also be written on and stuck on to the chart with tape.

### Steps

1. As it is important to get the dimensions right at the beginning, fold the paper as follows: fold it in half length-wise, then fold it in half width-wise and half again width-wise. Now unfold the paper and with a marker, draw a large H using the folds as your guide lines (don't bother drawing in the centre vertical line).
2. Write the question being discussed in the top centre area of the H-form. This question must be simple and focused, such as 'How well does the local economy benefit from forestry in this area?' or 'How well do organisations work together in this area?' or 'How good are the services for your horse in this area?' At the left end of the horizontal centre line of the H write 0 or 'not at all well' or a sad face symbol, and at the right end of this line write 10 or 'extremely well' or a smiling face symbol.
3. If you are working with a group of people, give each person a marker and ask them to place their individual score along the line between 0 and 10 (or 'not at all well'/'extremely well', or sad face/ happy face symbols). See Figure 1.
4. Give each person 3<sup>2</sup> 'post-its' and ask them to write (or draw) the negative reasons for their individual score, i.e. why did they not give it the maximum possible score. Write or draw one reason on one post-it.

<sup>2</sup> People are not limited to just 3 'post-its' if they need more they can use more nor do people have to use all 3 'post-its'. If they only have one reason that is OK.



Figure 3. H-form showing positive and negative reasons for scores

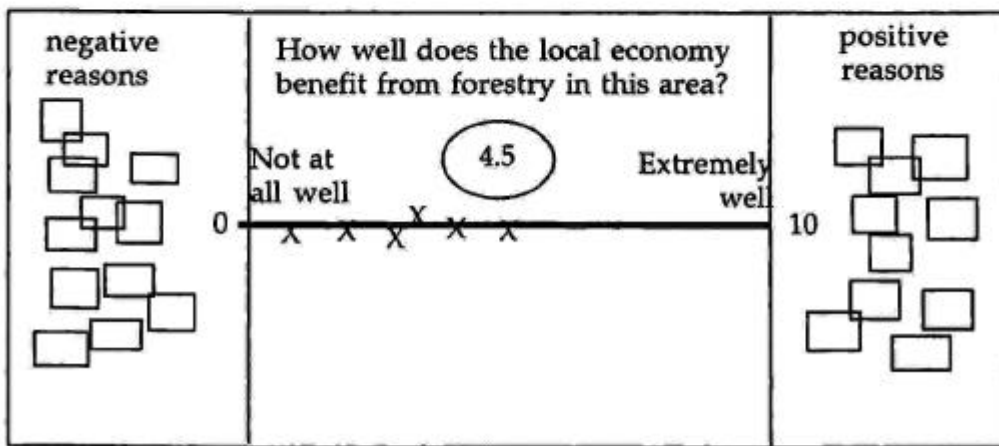
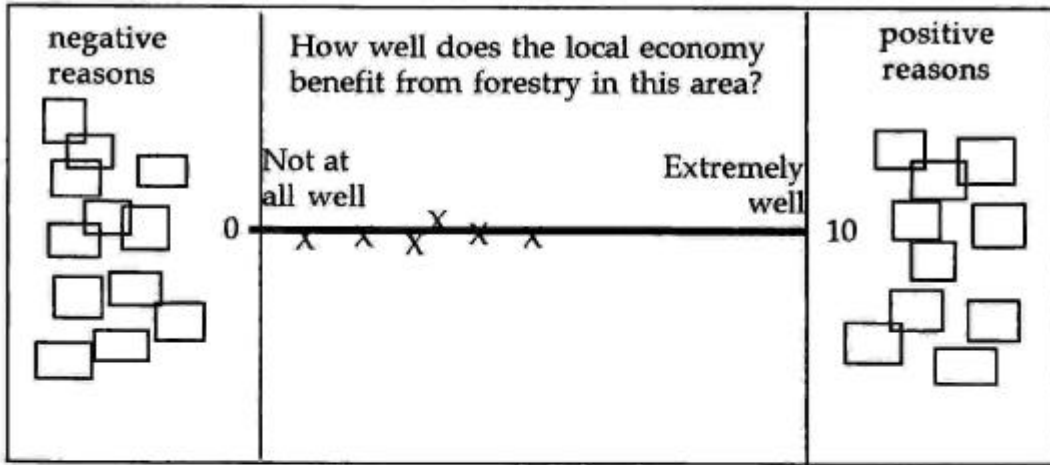


Figure 4. H-form showing group score

8. Once everyone has read out their negative and positive reasons for their individual score, the group can develop a group score. The facilitator asks the group to decide upon a score between 0 and 10 or whatever the scale is you are using. This group score is based on the negative and positive reasons people recorded on the 'post-its'. This is often a quick process because the group will have heard a wide range of reasons behind the individual scores and can therefore usually agree on the group score. Once the group has decided upon a score between 0 and 10 then that score can be marked as a large number (or number of beans) at the top centre section of the H-form.
9. Again, depending on the objectives, the next step could be to ask the group to list

ways in which the current situation as represented by all the positive and negative reasons could be improved. This is carried out by asking someone from the group to record everyone's ideas in the bottom centre half of the H-form. Alternatively, this step can also be done individually by giving each person 3 'post-its' (see Figure 5).

10. The outputs of this tool can be easily transferred into a report without losing any detail or changing any words or symbols people have used to record their own views and ideas (see Figure 6). This can be done by creating one H-form and marking on it all the individual marks from all the H-forms on the horizontal line and listing all the negative and positive reasons as well as all the ideas for improvement.

Another way is by scanning or photocopying (and reducing to A4 if

necessary) all the original H-forms and incorporating them in a report.

Figure 5. Completed H-form showing ways to improve the group score

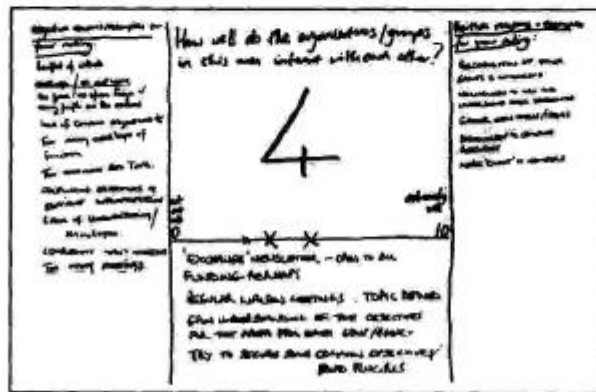
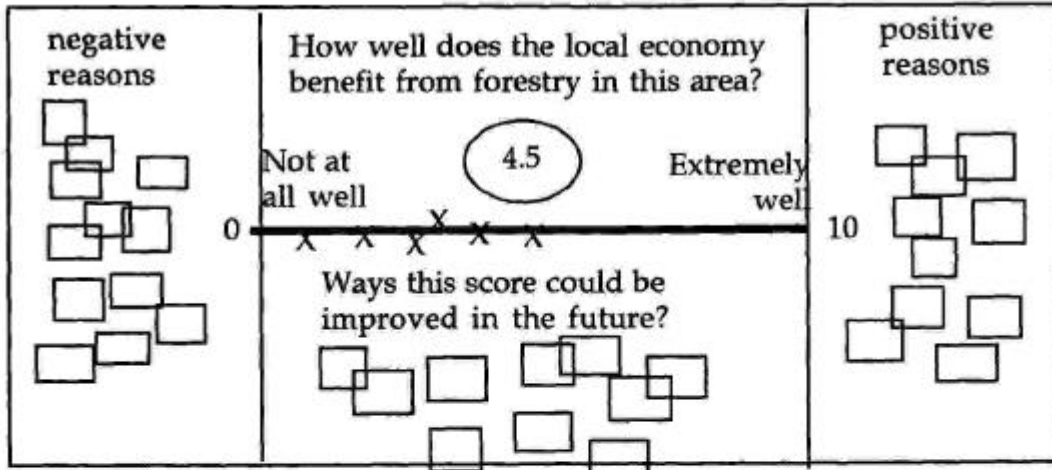


Figure 6. Example of an H-form transferred to report format

## Notes

We have found that this tool helps individuals and/or groups to record their own views and ideas in a non-threatening and open, yet structured, way which fosters individual expression as well as common understanding and consensus. It can be used in meetings, workshops, conferences as well as on the streets, in pubs, etc. The sequence and clear framework that the H-form provides keeps discussion focused, specific, progressive and can easily lead to action points. This structured format helps to facilitate and record semi-structured interviews without introducing facilitator biases. We have found that H-forms can be used to enable people of all ages to participate in indicator identification, monitoring, evaluation and planning for improvement in many contexts. This method can also be used alongside other visual/recording tools such as mapping, timelines, Venn diagrams, etc. If written words or numbers are not appropriate then symbols and scoring units (e.g. beans) can be used.

H-forms have been used to evaluate:

- how well objectives are being met;
- how effectively money is being spent;
- what students think of language courses;
- how well the local economy benefits from forestry;
- how much people have heard about a particular programme/project;
- how important farming is in an area;
- how well agencies/organisations work together; and,
- how involved local people have been regarding the development of National Parks, strategic plans, local plans etc.

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