

Helpful Models and Tips



H-Form Evaluation Method

In 1997, Andy Inglis developed a method to assist community people to monitor and evaluate community projects. He called this the 'H-Form' or 'Rugby Post form'. Since then it has been modified for use in evaluation exercises around the world.

Examples of applications:

- To assist people to evaluate the performance of programmes, projects, or initiatives
- To identify local indicators for ongoing monitoring and evaluation;
- To assist workshop participants to evaluate their training

Resources:

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 several packs of sticky notes.

Method:

1. To assist with getting the dimensions right, 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 much is our community benefiting from this project? Or 'How well do organisations work together 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).
4. Give each person at least three 'sticky notes' per question 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 sticky note. (People do not have to use 3 'sticky notes'. If they need more they can use more, if they require less that is fine also).
5. While participants are recording their own reasons, the facilitator can make a heading at the top left hand side of the H-form: 'Negative Reasons for Your Score'. Once everyone has written down their reasons, ask them to stick these up on the left-hand side of the H- form.

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6. Then ask the participants to record the positive reasons for their individual score, i.e. why they did not give a zero score. Once these are written on the 'post-its', participants stick these on the right-hand side of the form
7. Then each person reads out her/his negative and positive reasons for their score. Encourage people to simply read what they have written (or drawn) on their own 'sticky-notes without going into lengthy discussion, with any clarification if necessary. The group does not have to agree or disagree with any of the reasons people have recorded. This is simply an opportunity for each person's views to be heard and understood.
8. The next steps depend on the objective of the exercise. In most of the uses of the H form, one of the objectives has been to encourage the individuals in a group to record, share and understand each others' points of view. Asking them to agree to a group score provides the focus and impetus for the discussion of all the views expressed.
9. 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 'sticky notes'. 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 at the top centre section of the H-form.
10. 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 'sticky notes'
11. 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 1. Sample H-Form Evaluation

Negative Reasons

Sample Question: How well does our community benefit from our project?

Positive Reasons

Average Score: 5

0 Not at all well 10 Extremely well

Suggestions: ways this score could be improved in the future?

Notes

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 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.

H-forms have been used to evaluate:

- how well objectives are being met;
- how effectively money is being spent;
- what participants think of workshop courses;
- how well the local community benefits from a service
- how well agencies/organisations work together.

Reference: Susan Guy and Andrew S. Inglis, Scottish Participatory Initiatives, Edinburgh

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