

RATINGS AND SCALES

Qualitative and quantitative analysis techniques each have their own strengths and weaknesses. Many CSOs combine the two by translating qualitative data into quantitative formats. This is done by collecting qualitative data, coding it, and then analysing it using quantitative methods. The most common way of doing this within monitoring and evaluation is to use rating scales.

Qualitative analysis and quantitative analysis techniques each have their own strengths and weaknesses. Often, CSOs combine the two by translating qualitative data into quantitative formats. This is done by collecting qualitative data, coding it, and then analysing it using quantitative methods. This approach is particularly useful when monitoring and evaluating complex areas of work such as governance, empowerment or capacity development.

For monitoring and evaluation (M&E) purposes, the most common way to translate qualitative data into quantitative formats is to use rating tools (sometimes known as scales, or scalar tools). A rating tool is designed to allow evaluators, project or programme staff, or beneficiaries to rate performance, competence, progress or quality along a common, agreed scale.

- **Performance rating** is designed to assess whether key goals or objectives have been realised. For example, a rating tool can be designed to show the extent to which a project is achieving (or has achieved) its objectives. Typical points on the rating scale could include *'fully'*, *'mostly'*, *'partly'* or *'not at all'*.
- **Competence rating** is often used when assessing performance or progress in areas such as capacity development, empowerment or partnerships. The rating tool is designed to identify the competence or capacity of an organisation, programme, project or individual to carry out specific tasks. Competence rating can be carried out at the start of a project or programme to form a baseline, and then repeated at the end or at regular intervals to assess change over time.
- **Progress rating** can be used to identify what progress has been made by an organisation, programme, project or individual over a specified period. The rating is normally relative (e.g. *'good progress has been made'* or *'no progress has been made'*) rather than absolute.
- **Quality rating** is designed to assess the quality of a product or service. The rating is usually done by the end user of a product or service. For example, training providers often use feedback forms to assess the quality of training. Equally, community-based organisations (CBOs) may be asked to rate the quality of a CSO's capacity development support, or the quality of the partnership between the two organisations.

Rating tools often ask people to rate along a continuum. For example, participants may be asked to rate the quality of a training course from '1' to '10', with '1' representing *'very poor'* and '10' representing *'excellent'*. Other rating tools provide a series of pre-defined statements for each point on the scale. An example of this is contained in the case study below (Cafod 2011).

Case study: CAFOD Voice and Accountability Tool

CAFOD's Voice and Accountability Tool uses ratings to assess the ability of supported CSOs to carry out advocacy work. CSOs score themselves in four key areas: involvement in government processes, advocacy strategy development, community and constituency building, and involvement in corporate structures. A rating scheme with different, pre-defined levels is used to help CSOs assess their level in each area. An abridged version of the ratings scale for involvement in government processes is shown below.



Formal structures for consultation are recognised; their decisions have influence and can withstand political interference. Decision makers engage with CSOs in determining the policy agenda.

Formal structures for consultation are established. CSO input influences policy. Government acts on the demands of CSOs through changes in rhetoric used and changes in policy.

Formal structures for consultation are established. CSO gender sensitive input influences policy. Government acts on the demands of CSOs through changes in rhetoric used and changes in policy.

Ad-hoc fora for consultation with CSOs exist. Consultation processes are transparent, and government provides subsequent feedback. Decision makers are open to challenge.

CSOs internally establish policy positions through discussion and debate. There is the beginning of conversation/dialogue with government.

Strengths and weaknesses

CSOs use rating tools or scales in many different situations. Some of their strengths are as follows.

- Rating tools allow organisations to quantify progress in areas which are not susceptible to statistical measurement. They can be used in areas of work such as capacity development, policy influencing, empowerment, partnership and governance, where there are no industry standard indicators.
- Rating tools allow for the assessment of attitudes and perceptions (such as reactions to training courses) as well as more measurable, tangible, behavioural change. They also allow organisations to capture different viewpoints.
- Rating tools can allow complex qualitative change to be presented numerically or graphically, through simple visuals or summary tables.
- They are relatively easy to design and administer. Most rating tools have been designed or adapted by CSOs for their own purposes. CSOs often find rating tools much easier to use than more complex methodologies.
- As well as providing statistical information that can be analysed using quantitative methods, rating tools can provide information that can be probed in different ways to find out why people rated things differently.
- If used consistently, performance across different projects can easily be summarised and compared. However, for this to be done successfully the rating scale needs to be fixed across the different projects. For example, it is very hard to summarise or compare progress in two different projects where one uses an absolute, four-point rating scale and the other uses a relative scale from '1-10'.

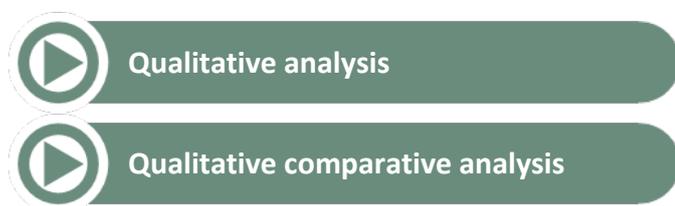
- Rating tools or scales can be developed in a participatory way, especially if designed to be used within a single project or programme. This can help enable a deeper understanding of what is important in an intervention from the point of view of project or programme staff and beneficiaries. It can also help identify what change might look like in practical terms (Sonderskov u.d.).
- The value of many rating exercises lies in the discussion and analysis itself. Different stakeholders can analyse and reflect on performance, progress, competence and quality, and come to joint conclusions (or agree to differ).

One weakness of rating tools, when used to assess competence, performance or progress, is that it can be very difficult to get consistent, reliable ratings. Rating tools tend to show positive progress by default, as stakeholders often do not want to admit that there has been little or no progress. Equally, different people may interpret ratings or scales in different ways – even when an organisation thinks it has precisely defined different points on a rating scale – and it can be hard to get reliable ratings across different interventions.

Another issue for rating tools or scales used to assess change at policy level or capacity development within organisations is that ratings may show change over time, but they do not always show what that progress means for people on the ground, or the contribution of different agencies in bringing about that change. In such cases additional M&E work may need to be done to assess why and how certain changes have come about, and what wider changes could result, or have already resulted.

Further reading and resources

Other papers in this section of the M&E Universe deal with qualitative analysis and quantitative analysis. Two methodologies that use ratings scales in different ways are covered in the papers on qualitative comparative assessment (QCA) and organisational assessment tools.



A recent paper by Sonderskov (see reference below) provides a useful introduction to the use of rating tools.

References

- CAFOD (2011). *CAFOD's Voice and Accountability Tool*. Accessed from <https://www.bond.org.uk/resources/cafod-voice-and-accountability-tool>.
- Sonderskov, M (undated). *How to Assess Qualitative Results at Rights' Holders and Institutional Level: An introduction to scales for performance measurements*. Strategihuset.

Author(s):
Nigel Simister

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Email: info@intrac.org

Tel: +44 (0)1865 201851



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