

VALUE-ADDED MONITORING: OUR BEST PRACTICES

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PLANNING

- Monitoring **mandate** within the context of the organization and unit
- Monitoring **objectives**
- Informational needs**
- Client profile**
- Human, financial, material and other **resources**
- Monitoring product** format

RECOMENDATIONS

- ★ Obtain **approval** and **support** from **organization** and **manager**
- ★ Identify **influential allies** and **partners**
- ★ Support the organization and unit's **mission** and contribute to **strategic planning and the action plan**
- ★ Define **communication strategies**
- ★ **Automate** the *Research, Monitoring, Collection* and *Dissemination* steps as much as possible to dedicate more time to the *Analysis and Processing* step
- ★ Select **online** tools that support **collaborative work** versus single workstation tools

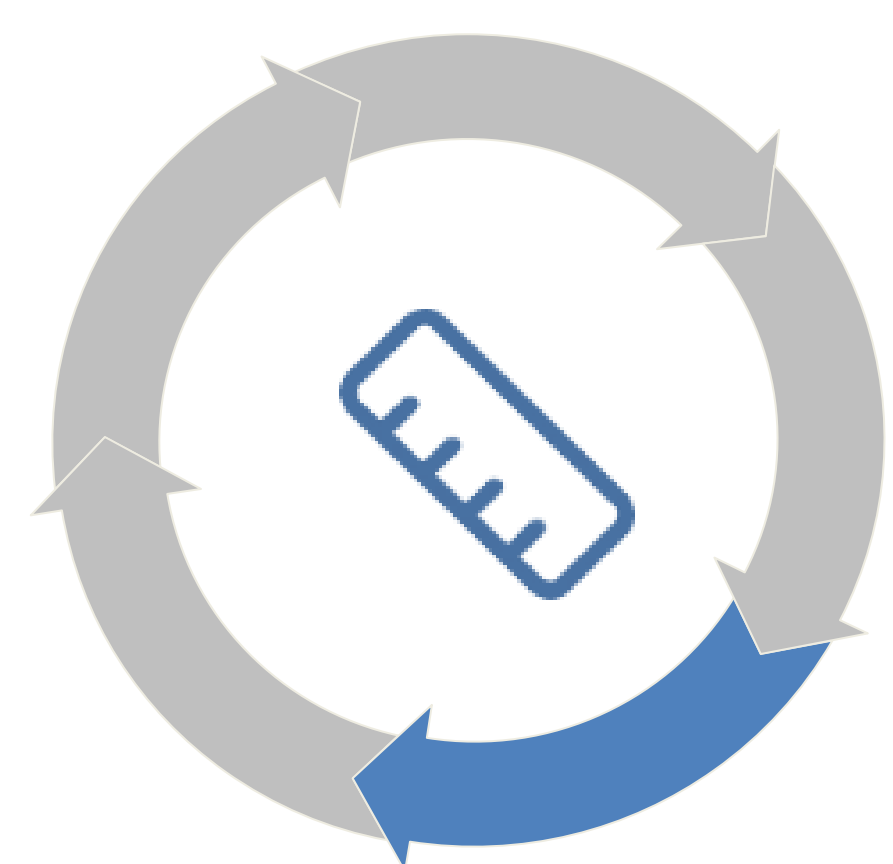


RESEARCH MONITORING GATHERING

- Useful topics** to support actions of the organization and its clients
- Internal and external sources**, relevant scientific results and useful evidence
- Research and information management** best practices
- Monitoring tools**
- Information **gathering** tools

RECOMENDATIONS

- ★ **Value-added monitoring** for **target groups** (including decision makers) rather than general monitoring
- ★ Make **time** to identify **reliable sources**
- ★ Rely on **objective criteria** to evaluate information sources
- ★ Encourage **collaborative monitoring** to allow for **co-development of knowledge/know-how**
- ★ **Monitor** for new informational and ad-hoc needs of the organization

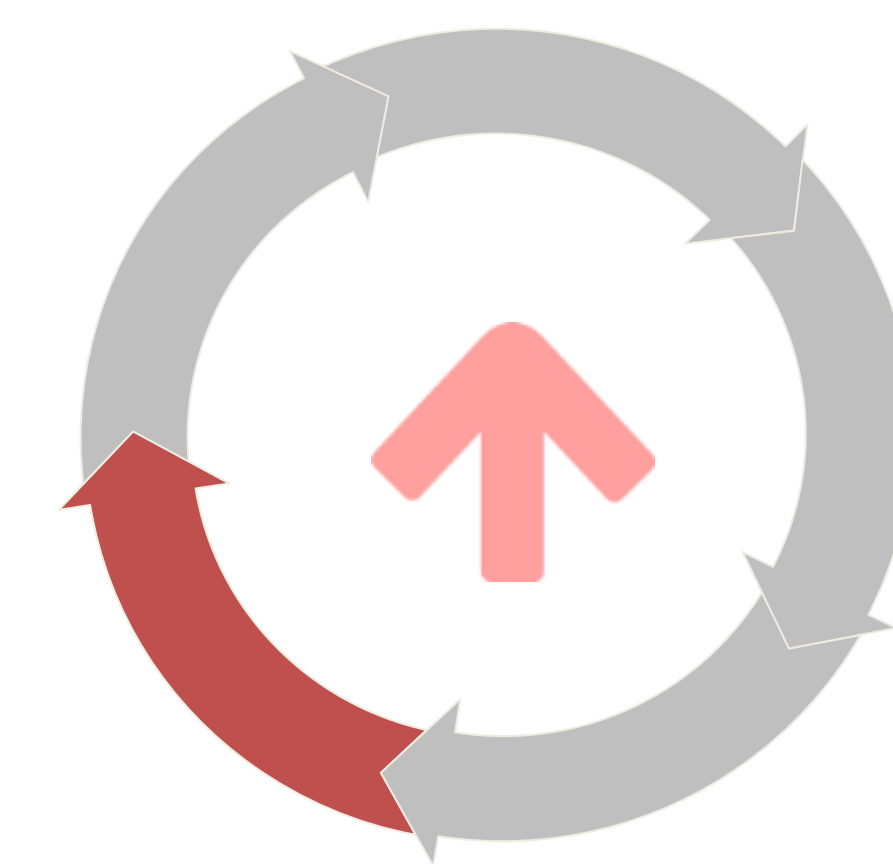


ANALYSIS AND PROCESSING

- Selection** of relevant information
- Critical analysis / Summary / Synthesis**
- Categorization/Indexing**
- Information processing and management** tools

RECOMENDATIONS

- ★ Add value:
 - ✦ **Index content** using keywords, tags, annotations, etc.
 - ✦ Produce **syntheses**
 - ✦ **Cite** short excerpts
 - ✦ Elicit **recommendations** from peers
- ★ **Name monitoring contributors** ("suggested by...")
- ★ Report **useful, reliable, personalized, contextualized and recent information**
- ★ Favour specificity over exhaustivity
- ★ Use the **organization's vocabulary**



DISSEMINATION

- Communication strategies**
- Best practices in **knowledge use and dissemination**
- Copyright** compliance
- Dissemination** tools

RECOMENDATIONS

- ★ Apply the **communication plan**
- ★ Consider the **visual aspect** of the products (attractive, good spacing, easy to read, images)
- ★ Disseminate **short, synthesized and categorized content**
- ★ Favour the **push model** to provide just-in-time information to clients
- ★ Consider different platforms (smartphones, tablets, email, etc.)
- ★ **Promote** the monitoring product through social networks, the intranet and the organization's website
- ★ Do not overlook **face-to-face dissemination** (oral transmission and verbal exchanges with clients)
- ★ Promote the **team** (names, photographs), **collaborators** and **successes!**



EVALUATION

- Client satisfaction** targeted
- Evaluation of:
 - use of monitoring**
 - impact of monitoring**
 - effectiveness of monitoring process**

RECOMENDATIONS

- ★ Regularly **survey** clients (survey, consultation statistics)
- ★ Elicit **ongoing feedback** to be aligned with needs
- ★ Ensure **monitoring process continues to evolve**
- ★ **Adapt to change** (tools, approaches, needs, context, etc.)
- ★ **Integrate monitoring best practices** to ensure ongoing improvement
- ★ **Monitoring is a daily activity**
- ★ Keep a **log book** to record decisions, approaches, lessons learned and opportunities
- ★ **Report** on monitoring use and impact to managers
- ★ **Dare to innovate!**

Context

"Research, innovation and knowledge transfer all have a central role to play in improving Quebec's health and social services system." [translation]

Ministère de la Santé et des Services sociaux, 2015-2020 Strategic Plan

What is Monitoring?

"Monitoring is a dynamic, rigorous process for the surveillance, management and dissemination of recent and relevant information that helps to anticipate issues and facilitate stakeholder decision making." [translation]

CdPVeille3S, Charte de collaboration, 2017

Why monitor?

- ➔ Facilitate decision making
- ➔ Innovate and seize opportunities
- ➔ Anticipate issues
- ➔ Stay informed and improve professional practice
- ➔ Address the abundance of information

Monitoring tools

- Research, surveillance and collection
- Analysis and processing
- Dissemination
- Evaluation



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