

THE MERQI TREE

Visualizing the overlap between Monitoring, Evaluation, Research, and Quality Improvement



Figure 1 - MERQI Tree

Introduction

Several approaches exist for reviewing, analyzing, and improving health care initiatives. Some of these approaches include: monitoring, evaluation, research, and quality improvement (QI). These approaches have similarities and differences, and the boundaries are not always clear cut.

The purpose of the MERQI tree is to illustrate some of the important features of monitoring, evaluation, research, and QI. It is hoped that this illustration will:

- Provide a better understanding of the role of evaluation within the Clinical and Systems Transformation (CST) Project;
- Illustrate the overlaps between the different approaches;
- Assist different teams to collaborate while collecting data and sharing them when possible;
- Demonstrate that all approaches may coexist in a given setting with each serving their unique but complementary purposes.

How to read the MERQI tree

The MERQI Tree is shown in Figure 1. Each part of the tree represents a different approach with its own unique feature(s). Areas of overlap illustrate features that are common between approaches. The trunk of the tree represents a common feature (systematic) that is shared between all four approaches.

The features identified in Figure 1 were determined by the CST Evaluation Team to be most relevant in the context of the CST project, but it is understood that each approach is complex and may include other features that may not have been listed here.

Defining Monitoring, Evaluation, Research, and Quality Improvement

- **Evaluation** is the “systematic assessment of the design, implementation,”¹ and/or outcomes of an initiative in order to enhance learning, improve effectiveness, and/or inform decision-making¹.
- **Monitoring (a.k.a., performance monitoring or performance measurement)** is the systematic “routine collection”² and analysis of data on specified indicators to document the extent of progress towards achieving intended outcomes.^{2,3,4}
- **Quality improvement** is the “systematic, data-guided activities designed to bring about immediate improvements”⁵ in outcomes and/or service delivery in a given setting.⁵
- **Research** is the attempt to derive new knowledge “through a disciplined inquiry”⁶ using systematic and rigorous methods.^{6,7}

Description of Features

Some features are self-explanatory; hence, they are not included in the table below.

Feature	Description
Systematic	Activities are conducted in a methodical manner.
Reproducible	A study/project is thoroughly documented so it can be repeated.
Generalizable	When a sample is representative of a population, it suggests the results of the study can be applied to that population.
Overarching Question	A high-level question that informs the purpose of a study. It guides the study design, data collection, and analysis.
Holistic	Considers broader aspects of an initiative when assessing it; considers how aspects of an initiative are interrelated. An analogy would be that a holistic approach looks at all pieces of a jigsaw puzzle as a whole as opposed to focusing on an individual piece.
Rapid cycles	Changes/improvements are made and tested over short periods of time.
Small/large scale intervention	Refers to the scope of the project/initiative being assessed.

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