OutcomeMapping
LEARNING COMMUNITY

M&E and Outcome Mapping
Monitoring Design

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outcomemapping.ca

Monitoring in Outcome Mapping

Basic principles of monitoring in Outcome Mapping (refresher)

Monitoring Design Issues
Experiences from practice

Monitoring Practice
Approaches, tools & instruments

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1. Basis principles of monitoring in OM

Based on OM Manual

THREE STAGES OF OUTCOME MAPPING

INTENTIONAL DESIGN

STEP 1: **Vision**

STEP 2: **Mission**

STEP 3: **Boundary Partners**

STEP 4: **Outcome challenges**

STEP 5: **Progress Markers**

STEP 6: **Strategy Maps**

STEP 7: **Organizational Practices**

OUTCOME & PERFORMANCE MONITORING

STEP 8: **Monitoring Priorities**

STEP 9: **Outcome Journals**

STEP 10: **Strategy Journal**

STEP 11: **Performance Journal**

EVALUATION PLANNING

STEP 12: **Evaluation Plan**
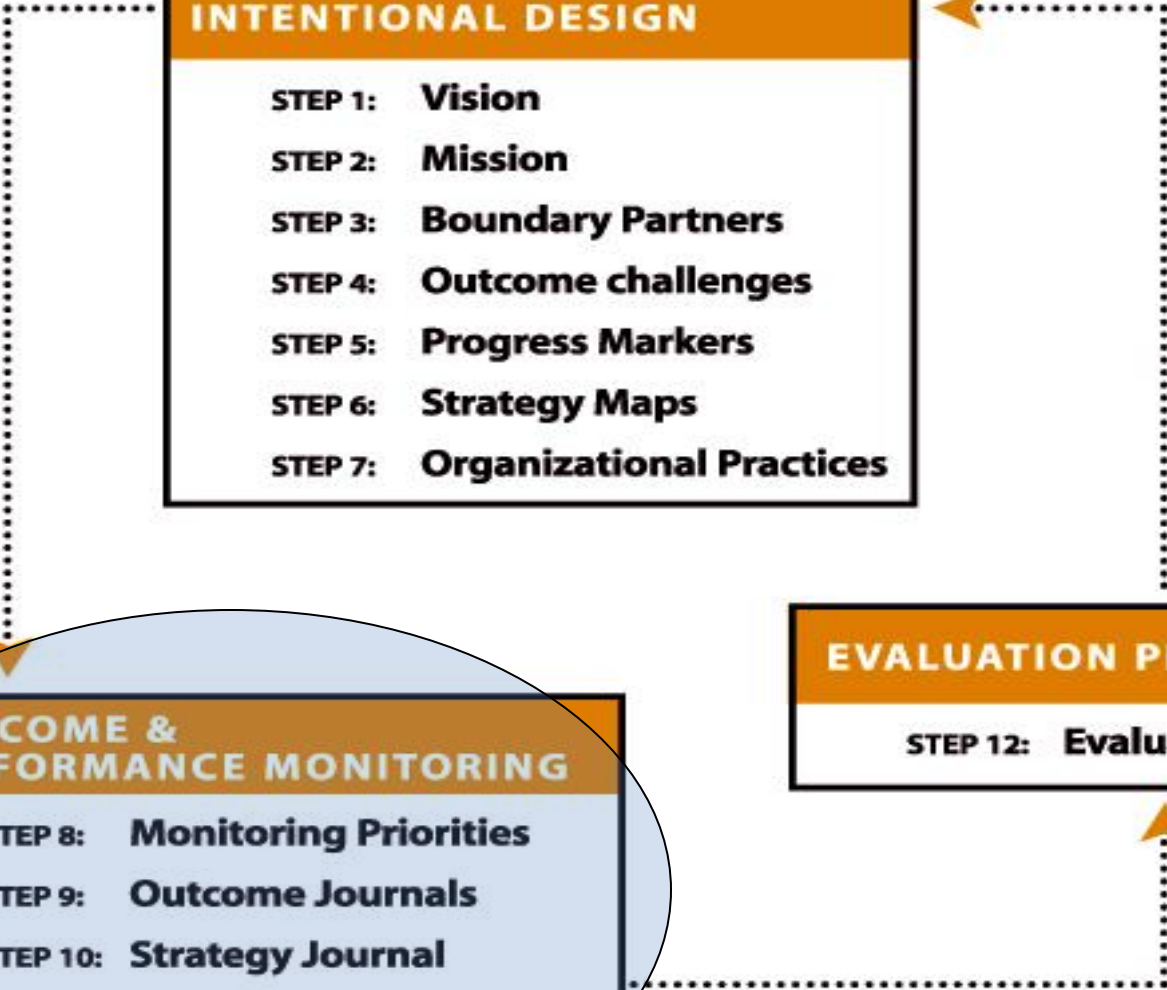
Outcome Mapping Monitoring

- Systematic collection of data on outcomes and performance

- A regular learning & improvement cycle

- Credit a program for its contribution to bringing about change

- Encourages the program to challenge itself

Time to discuss, reflect, and generate new ideas are key in the monitoring process of Outcome Mapping.
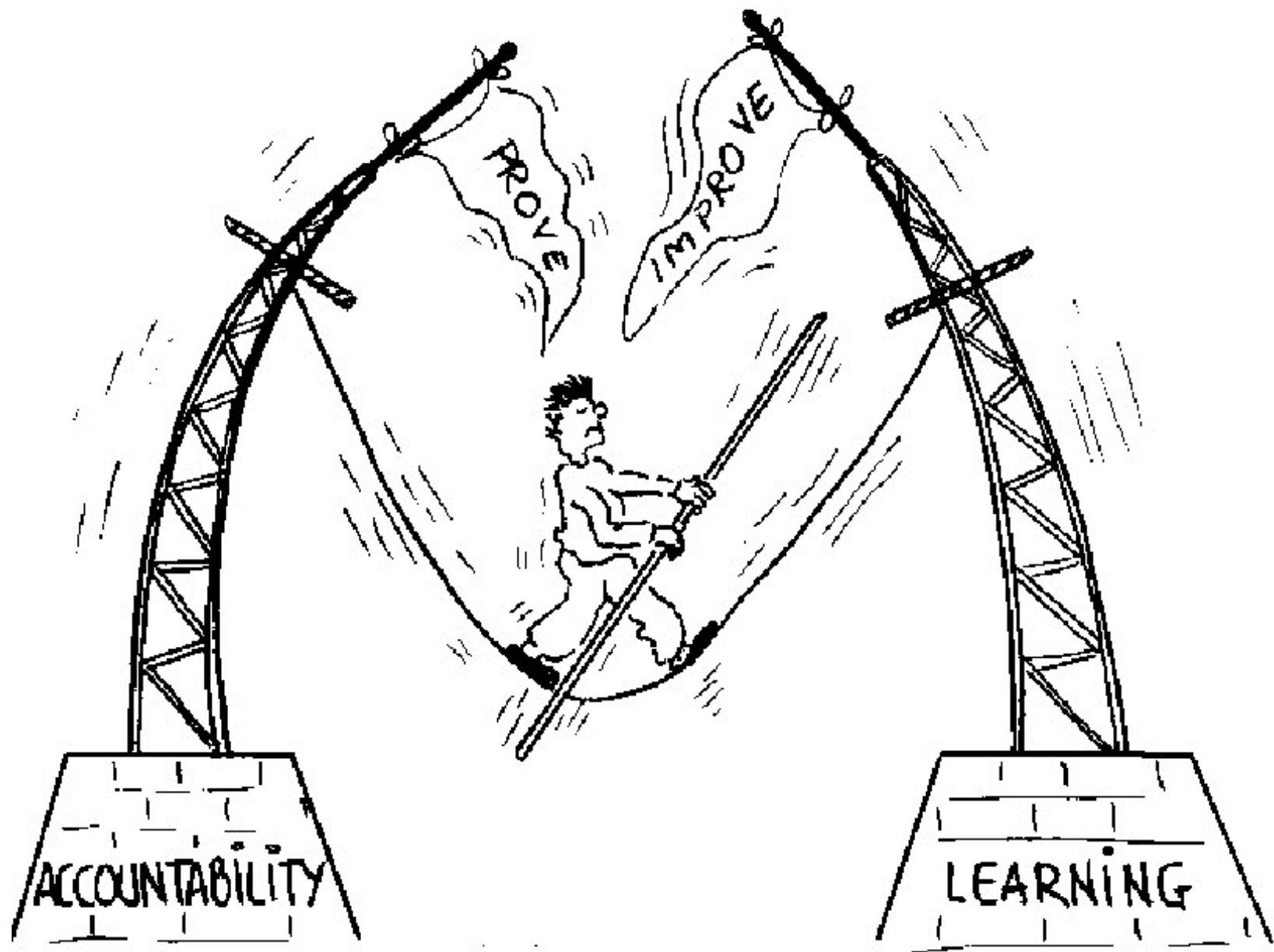
Outcome Mapping Monitoring

- Flexibility

- Participatory

- Evaluative thinking

- Organisational & social learning

- Power of self-assessment

- Regular face-to-face meetings
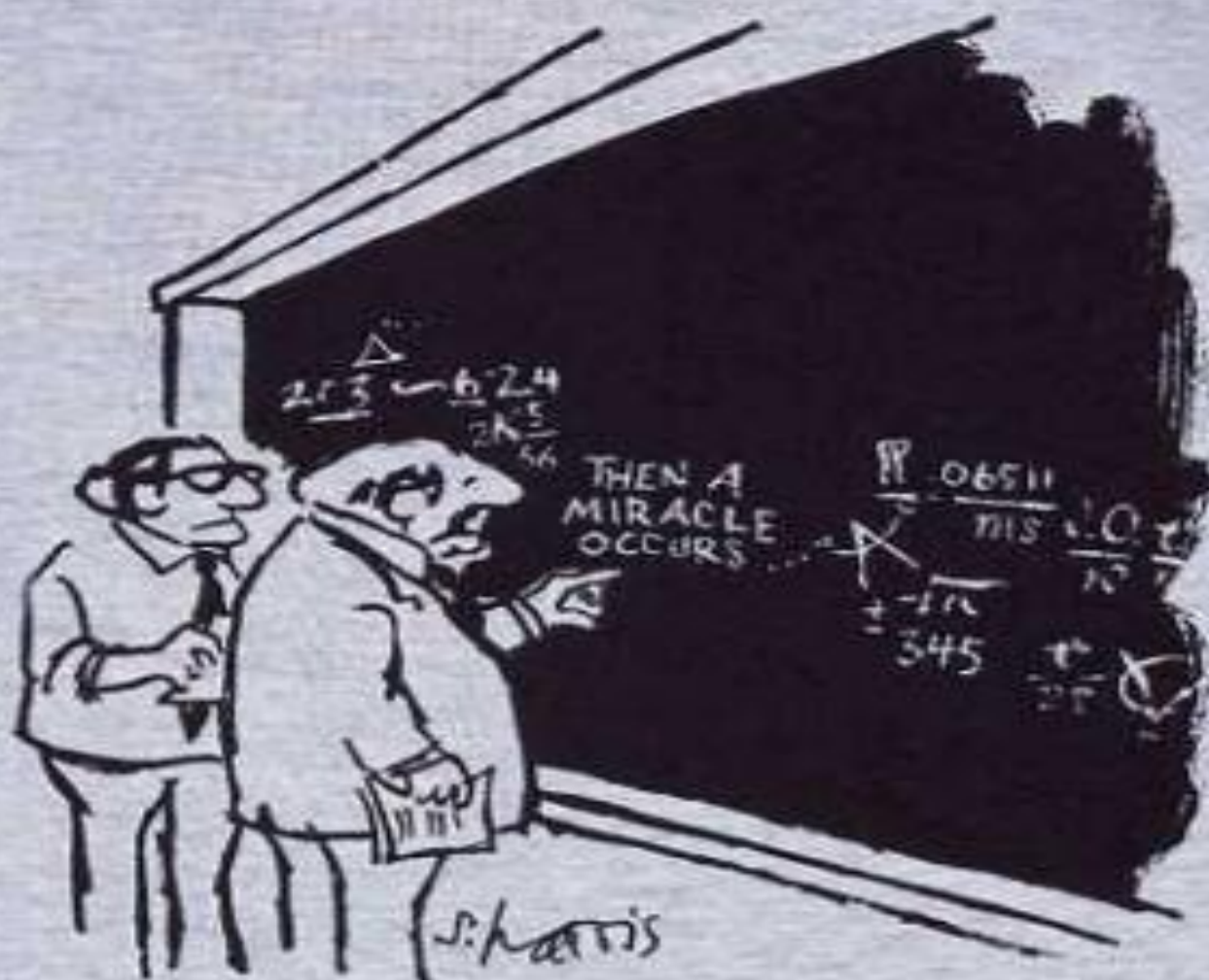
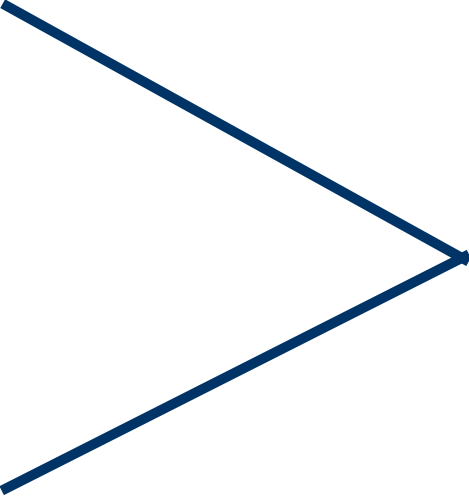"I THINK YOU SHOULD BE MORE EXPLICIT HERE IN STEP TWO."

design
boldly

within the broadest
development context
or sphere of interest

M&E
modestly

within the
program's
sphere of influence

Monitoring Plan

MONITORING WORKSHEET 1: MONITORING PLAN							
Monitoring Priority	**Who Will Use the Info.?**	**Purpose of the Info.?**	**When Is the Info. Needed?**	**Who Will Collect the Info.?**	**How Often Will It Be Collected?**	**How Will It Be Collected?**	**Proposed Monitoring Tool**
Boundary Partner's Achievement of Outcomes							**Outcome Journal**
Program's Strategy (ies)							**Strategy Journal**
Program's Organizational Practices							**Performance Journal**

Response of the programme

- What should we keep doing?

- What do we need to change in order to improve

- Are we still working with the right BPs?

- What strategies/practices do we need to add?

- What strategies do we need to end?

- What should be evaluated in more depth?

2. Monitoring design issues

Experiences from practice

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Making learning explicit
Use of Spaces & Rhythms (*)

Conventional M&E design

- Information needs related to the programme framework (objectives, results, outcomes, … + indicators)

- Data collection methods

- Reporting

Outcome Mapping (as foreseen in manual)

- Focus on monitoring priorities: Who? How?

- Use of outcome, strategy and performance journals

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(*) Guijt & Ortiz (2008)

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Program's Strategy (ies)							Strategy Journal
Program's Organizational Practices							Performance Journal

Assumptions about monitoring

- Monitoring process = learning process > reflection and analysis will happen

- M&E results will be used

- Users have the capacity, time and willingness to participate or facilitate the monitoring process

- Monitoring PMs, SMs and OPs is enough to pave the way forward

- The M&E/OM practice is embedded in organisational or programme management cycles

- …

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Making learning explicit

For learning to happen
> **data** is not the starting point
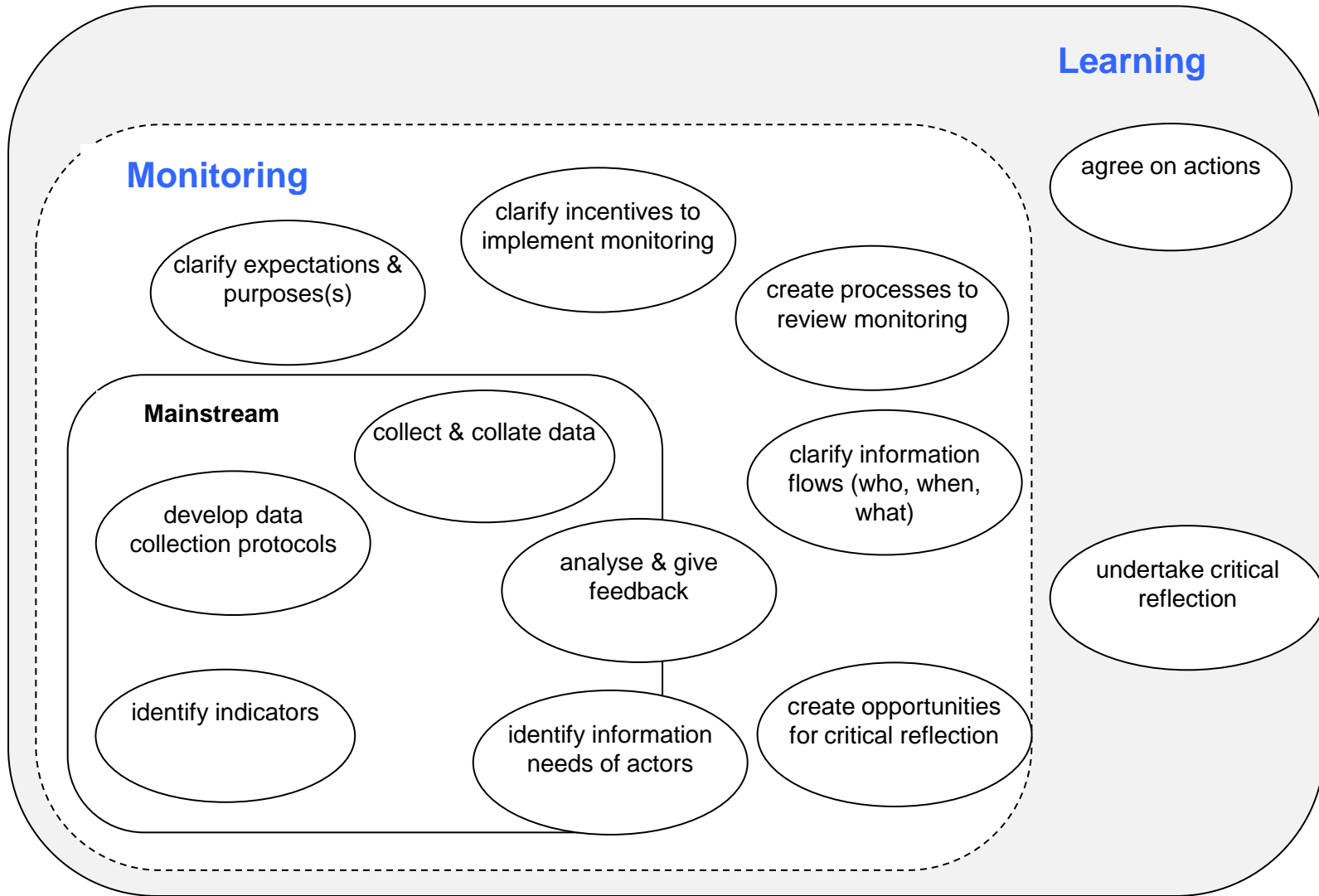
Starting from the intended **intended use**

Start with defining the **spaces** that are crucial for debate, sharing, decision-making, …

Make **M&E integral** to the thinking and doing of the organisation and programme

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Learning

Monitoring

clarify incentives to implement monitoring

agree on actions

clarify expectations & purposes(s)

create processes to review monitoring

Mainstream

collect & collate data

clarify information flows (who, when, what)

develop data collection protocols

analyse & give feedback

undertake critical reflection

identify indicators

identify information needs of actors

create opportunities for critical reflection

(Source: Seeking Surprise (Guijt, 2008)

Three core steps in the design of a learning-oriented monitoring system

BE CLEAR ON PURPOSE, USES & USERS

DEFINE ORGANISATIONAL SPACES & RHYTHMS

DECIDE ON INFORMATION NEEDS

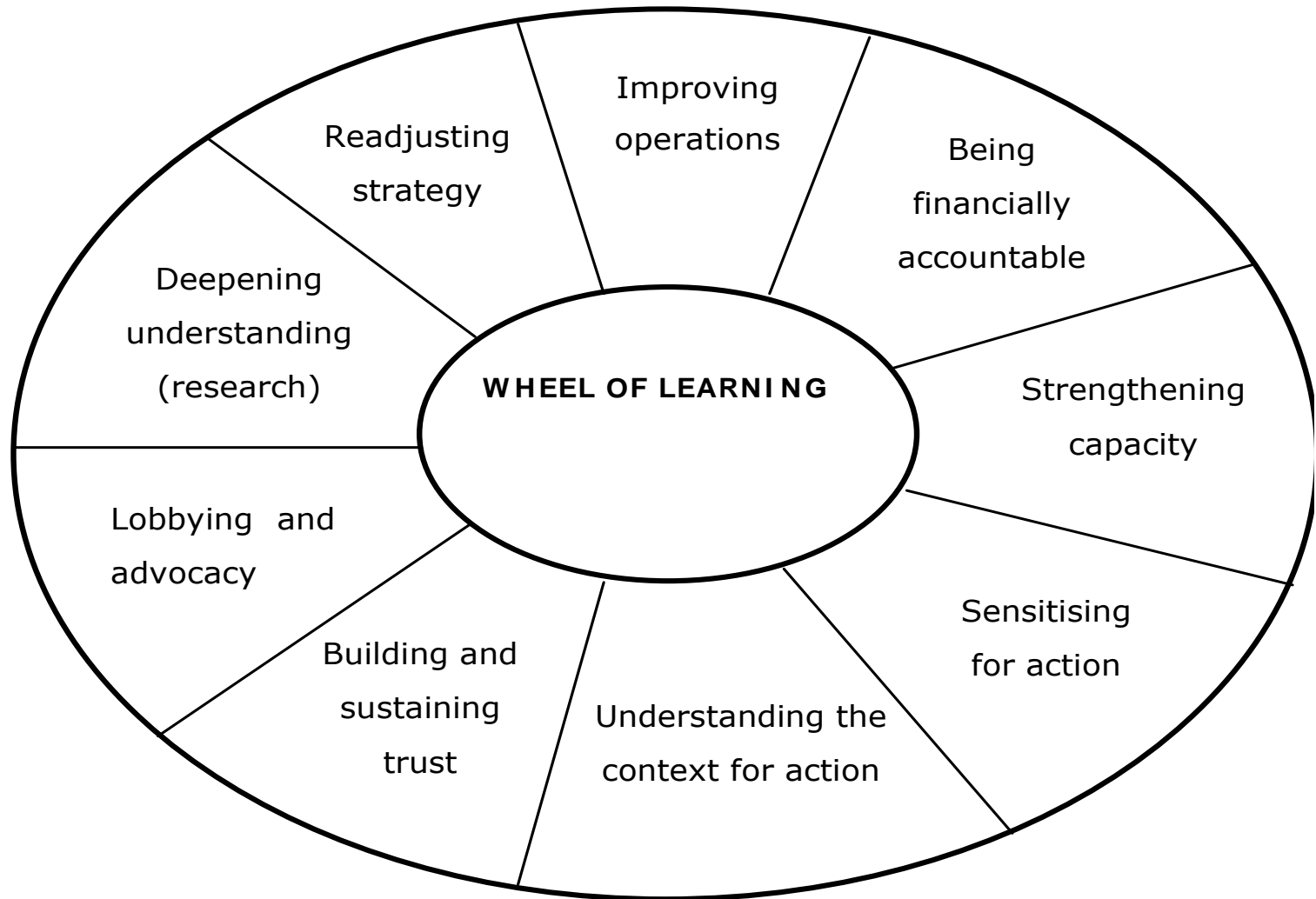Which information is required, for who, at what time/event, in what form, to do what?

Step 1
WHAT IS THE PURPOSE, USE & USERS OF THE M&E SYSTEM?

E.g. Intended uses of M&E process (Patton)

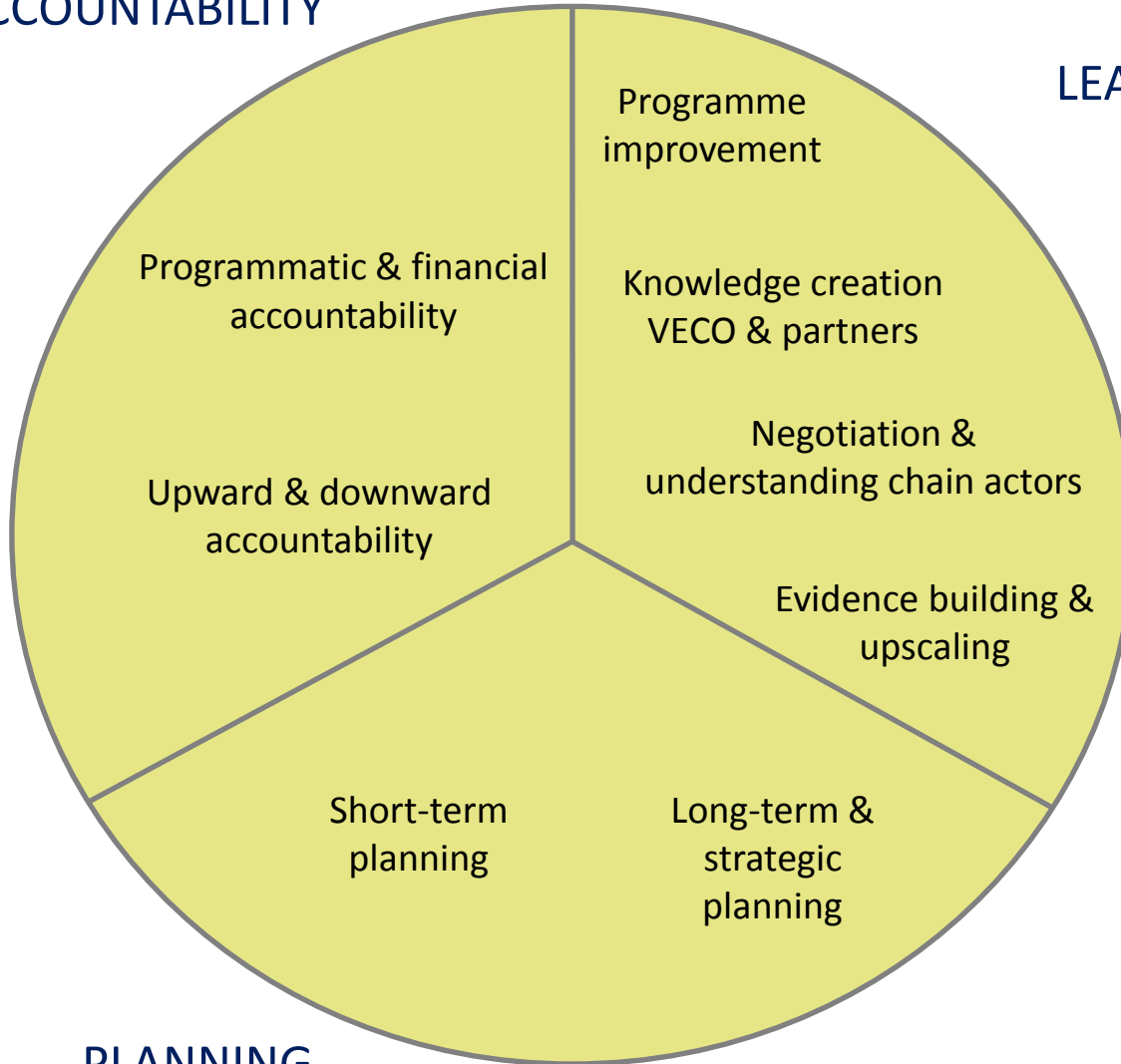| Intended uses of M&E processes	
Product use	1.1 Judgement-oriented
	1.2 Improvement-oriented
	1.3 Knowledge creation-oriented
Process use	2.1 Enhancing shared understandings
	2.2 Supporting & reinforcing the programme intervention
	2.3 Increasing engagement, self-determination and ownership
	2.4 Programme and organisational development

e.g. Wheel of Learning Purposes (Guijt, 2008)
Be clear about the purpose of learning

Improving operations

Readjusting strategy

Being financially accountable

Deepening understanding (research)

WHEEL OF LEARNING

Strengthening capacity

Lobbying and advocacy

Building and sustaining trust

Understanding the context for action

Sensitising for action

e.g. PLA system VECO (Deprez, 2010)

ACCOUNTABILITY

LEARNING

Programme improvement

Programmatic & financial accountability

Knowledge creation VECO & partners

Negotiation & understanding chain actors

Upward & downward accountability

Evidence building & upscaling

Short-term planning

Long-term & strategic planning

PLANNING

Three core steps in the design of a learning-oriented monitoring system

Step 1:

WHAT IS THE PURPOSE, USE & USERS?

Step 2:

DEFINE ORGANISATIONAL SPACES & RHYTHMS

• What are the spaces and rhythms central to planning, learning, accountability, debate, decision-making, …
(Guijt & Ortiz, 2007)

• Make M&E integral to the thinking and doing of the organisation and programme

Organisational spaces

Formal and informal meetings and events which bring organisations and programmes to life

Rhythms

Patterns in time, the regular activities or processes which provide a structure-in-time, through which an organisation can direct, mobilise and regulate its efforts, i.e., regular weekly, monthly, annual activities that characterise the tempo of organisational functioning.

Spaces and rhythms spell out the organisation's governance structure (Guijt, 2008)

When do people interact and share information and make sense of what is happening?

Define spaces & rhythms of VECO's

- Which spaces (events) and rhythms (frequency) are central to the **planning, learning & accountability** throughout the year?

ORGANISATIONAL SPACES VECO MA	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Multi-stakeholder chain meetings						■					■	
Reflection & planning meeting VECO MA							■					■
Development of annual operational plan partners	■											
Development annual plan VECO MA		■										
Regional programme meetings				■			■					■
Annual report process	■	■										■
Ongoing meetings with partners	■	■	■	■	■	■	■	■	■	■	■	■

Description of main spaces & rhythms

EVENT	Time/ frequency	Who participates	Who coordinates	What is the purpose of the event	What is the expected output	Which data Information is required
…						
…						
…						

> Group exercise

Three core steps in the design of a learning-oriented monitoring system

Step 1:
WHAT IS THE PURPOSE, USE & USERS?

Step 2:
ORGANISATIONAL SPACES & RHYTHMS

Step 3:
DECIDE ON INFORMATION NEEDS
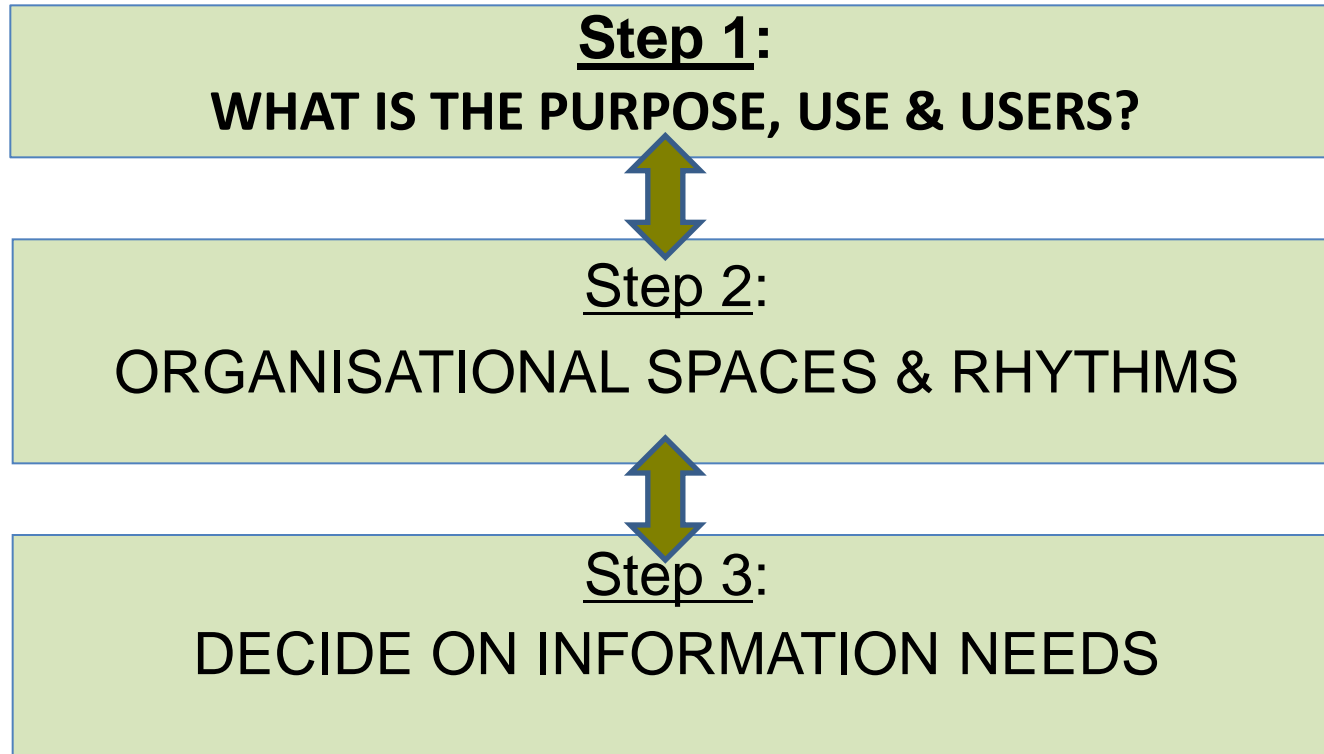
- Which information is required?
- Type of information?
- *From 'Nice-to-know' to 'Must-know' information*

Masterlist of info needs

General info need	Specific information need? (questions)	Frequency *By when?*	Who has the info? Or where is the data generated?	Data collection method/approach?	Who will use the info at which event?

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Plan for sense-making

- Monitoring does not end with data generation

- Plan how data is used and analysed
> *make it usable for action*

- Focus on social interaction: *sharing, debate, learning, decision-making*

- **Should be well-planned & requires facilitation !!**

Institutionalising OM / learning-oriented M&E

1. Creating organisational conditions: **motives, means & oppportunities** *(Deprez, 2009)*

2. The **'web of institutionalisation'** *(Caren Levy, 2006)*

*> Alternative way of looking at **Organisational Practices** (instead of the 8 organisational practices)*

1. Creating the organisational conditions for an learning-oriented M&E systems

Creating Motives
- Guiding ideas
- Support by management
- Develop a learning Culture
- Provide incentives

Creating Means
- Human capacities
- Specialist support
- Concepts, methods and tools
- Budget

Creating Opportunities
- Integration in planning and management
- Clear M&E plans and responsabilities
- Responsive information management system
- Trust and respect – speak out, challenge, feedback

See: Creating the Organisational Condiations for a learning-oriented M&E system (Steff Deprez, 2009)

2. The web of institutionalisation (Levy, 2006)

See: THE PROCESS OF INSTITUTIONALISING GENDER IN POLICY AND PLANNING: THE 'WEB' OF INSTITUTIONALISATION (Levy, 2006)