M&E and Outcome Mapping
Monitoring Practice

Kaia Ambrose & Steff Deprez

Brussels, Belgium
March 25-26, 2013

IDRC ✳ CRDI

outcomemapping.ca

Monitoring Practice in OM

- ✓ Working with progress markers, boundary partners and organizational practices

- ✓ Sensemaking with boundary parnters

- ✓ Ongoing challenges

OutcomeMapping

LEARNING COMMUNITY

Working with progress markers

So, how do we use progress markers during the monitoring process?

- Depends on the purpose and use

- Depends on the M&E culture

Boundary Partner: APPOLI

Outcome Challenge:

APPOLI functions effectively as a professional, accountable and membership-based farmer organisation. It has a strong registered membership base and has the capacity to play an central role in the healthy rice chain in Boyolali district. It supports and facilitates healthy rice development with the implementation of innovative and ecological sustainable farming practices taking into account environmental issues at the farmer group level and relate successfully with government, NGOs, the private sector and other civil society actors. It creates opportunities for women farmers to participate in (training) activities and take up leadership roles. APPOLI installs a profitable collective marketing system which generates sufficient income to sustainably support its activities.

Progress Markers

1. Promotes women's leadership and women's participation in the organisation

2. Actively organises technical training for its members on environmental sustainable rice production (e.g. on SRI, integrated crop management (SLPTT), composting, ...)

3. Develops rules of membership and organise regular and transparent member subscriptions + develops a member database

4. Develops standards for healthy rice and organises an Internal Control System (ICS) including appropriate training

5. Conducts experiments with implementation of innovative and ecological sustainable farming practices related to increasing production (in at least 4 sub districts: Mojosongo, Sambi Simo, Nogosari)

6. Establishes contracts with buyers at a price that benefits the farmers

OutcomeMapping

LEARNING COMMUNITY

Working with progress markers

✓ Use progress markers as a checklist to track progression against pre-defined behavioural changes for a specific partner in a specific period of time; use of scoring (LMH, 1234, colour)

✓ Write a qualitative description of change (I.e. every 4-6 months) for each pre-defined PM for a respective period

✓ Other monitoring tools, qual or quan, that are then cross-referenced with pre-defined PMs (new ones added)

Working with progress markers: **who?**

✓ BP describe their own change - then send to implementing team

✓ Implementing team describes change based on their own observations

✓ Mutual reflection process with team and BPs

✓ External evaluator judges progression in change

Working with progress markers: **what?**

✓Every single PM monitored

✓Only PMs that are relevant for a specific period

✓PMs and / or OCs used to trigger discussion during reflection process; key changes documented

✓Depth of analysis can vary

✓Across different BPs (comparison)

✓In combination with SMs (effective intervention?)

OutcomeMapping

LEARNING COMMUNITY

Working with progress markers

Using progress markers at an organisational scale (across programmes)

✓Different geographical regions

✓Different thematic foci

✓Different type and bigger numbers of boundary partners

Use of progress markers for whom?

✓Use of general & standard progress markers for each type of BP

-less (or not) useful for the individual projects and their actors

✓Tailor-made progress markers for individual BPs

+ relevant to guide and steer local projects and their actors

- less useful for higher levels, overload detailed data & aggregation is difficult

Sensemaking with BPs

✓Regular (4-6 months) reflection with staff + BP (one or more), external evaluator, other stakeholders

✓Embedded in spaces and rhythms of the programme

Working with strategy maps

✓ Useful for monitoring relevance, effectiveness and efficiency of the supporting activities of the implementing team

✓ Understand how you spend time and money within a programme team

✓ Get direct feedback from BPs on the required / requested support

OutcomeMapping

LEARNING COMMUNITY

e.g. VECO Indonesia - 9 categories of strategy maps

Every activity that is carried out by the VECO can be linked to one of the 9 support strategies.

OutcomeMapping

LEARNING COMMUNITY
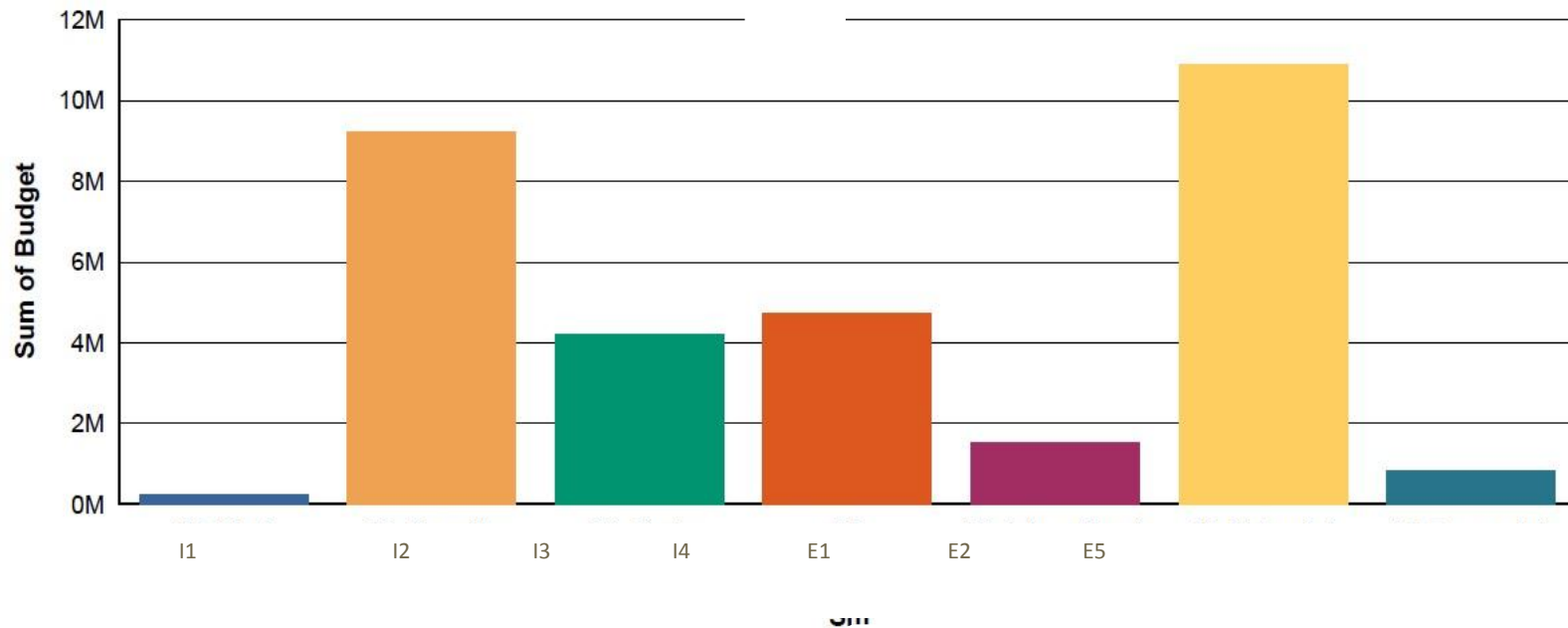
EXAMPLE MONTHLY OVERVIEW

Coffee in Sulawesi

Sum of Budget / Sm

OutcomeMapping

LEARNING COMMUNITY

Working with organisational practices

✓Use as is in manual

✓Use of OCs and PMs at the level of the implementing organization

✓Motives, Means and Opportunities

✓Web of institutionalisation

OutcomeMapping

LEARNING COMMUNITY

Reports and Journals

✓ Simplified journal formats

✓ Combined PM and SM reports

✓ Integrate elements from journals into regular programme reports

✓ Integration in MIS, databases, etc.

✓ Used as final report, or as report embedded within another report

✓ OM journal as a database

✓ SM as an activity guide

Evaluation using OM

✓ OM in retrospective - whether the initiative has used Intentional Design or not

- Oxfam Mid-Term Learning Review - asking BPs to reconstruct most significant changes, influencing actors and factors of that change, and effects / consequences of that change; modified OM journals + workshops for group reflection

✓ Reconstruction of results using OM as a framework

- McKnight Foundation evaluation - tracking progression of change / reconstructing pathway of change ("then what happened"); create outcome journals for future monitoring

✓ Outcome Harvesting

OutcomeMapping

LEARNING COMMUNITY