



OutcomeMapping

LEARNING COMMUNITY

Progress Marker Indicators for Developmental Change

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outcomemapping.ca



Agenda – Proposed

9:00 – 9:25 Welcome and impromptu networking.

9:25 – 9:45 Setting the context - Principles of OM, developmental change and complexity.

9:45 – 10:45 What are useful PMs? What are PM patterns of change? Criteria for capturing progress. Socratic Wheel exercise – Part 1

Break

11:00-12:30 Socratic Wheel Part 2- Food Systems Change Case Story . PMs for Participants projects.

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Workshop Objectives

- Engaged, practical and reflective learning session that unleashes everyone.
- Gain understanding about useful progress marker indicators.
- Introduce Socratic Wheel tool for participatory development and benchmarking of PMs.



Impromptu Networking- 15 min.

- What persistent challenges do you bring to this gathering?; What do you hope to get from and give this group?
- In pairs standing up. 2 minutes per person (4-5 minutes per pair) . Then move to a new pair.
- 3 rounds of paired conversations (Heidi will signal to change).
- Debrief process and any observations.



Setting the Context + Pre-Survey

Most of you want to reflect on useful PMs.

1. Principles of OM – Quick Overview

(85% of participants have a moderate to high level of knowledge about OM , ToC and DE).

2. Complexity Theory : A framework for PM&E

(85% of participants have low to moderate knowledge of complexity theory).

3. Research on Progress Markers in OM (2011)

and interactive exercise.



Outcome Mapping Principles

1. Sustainable ecosystems and human wellbeing depend on human behaviour. Development always involves establishing patterns of behaviour.
2. There are limits to the influence that any intervention can expect to exert.
3. People contribute to their own wellbeing; there are no passive beneficiaries.



Outcome Mapping Principles

4. Engaging the relevant actors while recognizing, reconciling or managing their differing motivation for involvement is a normal part of an intervention.

5. Ecological, social and economic resilience depend on interrelationships. Sustainable improvements in wellbeing involve influencing interconnected contributions from a variety of political, social and economic actors.



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OM is best used in PME interventions that:

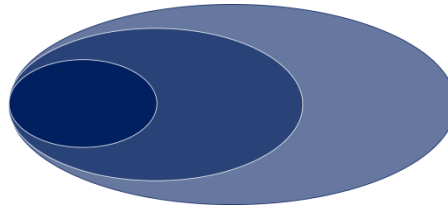
1. Includes changed behaviours or relationships among the intended results;
2. Anticipates that desirable and intended results may evolve or emerge as the intervention progresses;
3. Seeks 'sustainable' results with the resilience to adapt with changing situations;
4. Intends to monitor progress, making adjustments during implementation;
5. Intends to focus on results defined from the perspective of local actors or beneficiaries. (U-F E)



OM's answer



Start from observable behaviour change



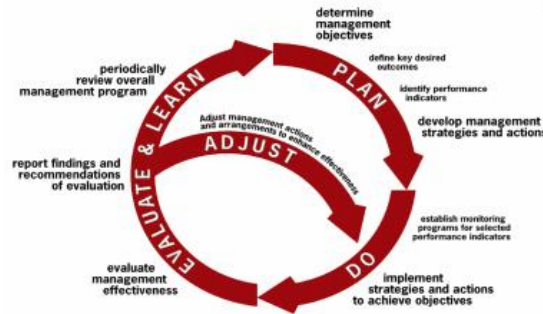
Recognise that all interventions have limited influence



Support people to build their own well-being



Embrace different perspectives



Enable interventions to adapt as they engage



Apply a systems understanding



Complexity Theory a Useful Framework



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2 minute Game: Solar Eclipse

- Ask each participant to look around the circle and privately decide on one other person who they will consider Person Sun.
- Then ask them to pick another person, again secretly, and label that person, Person Moon.
- Inform them that the goal is to make sure that Person Moon is between you and your Person Sun at all times (creating a solar eclipse).
- Take 1 minute to play then Heidi will pause.



Cynefin framework

Complex

the relationship between cause and effect can only be perceived in retrospect

probe – sense - respond

emergent practice

Complicated

the relationship between cause and effect requires analysis or some other form of investigation and/or the application of expert knowledge

sense – analyze - respond

good practice

novel practice

no relationship between cause and effect at systems level

act – sense -respond

Chaotic

best practice

the relationship between cause and effect is obvious to all

sense – categorize - respond

Simple

A key concept to determine complexity, beyond that of uncertainty, is driven by the purpose of your intervention. Watch 3 min. video and buzz

[Michael Quinn Patton](#)

What does OM tell us
about progress
markers?



Progress Markers

Love to see

(The owned journey –
continuous and sustained)

Like to see=P2

(Building support and networks)

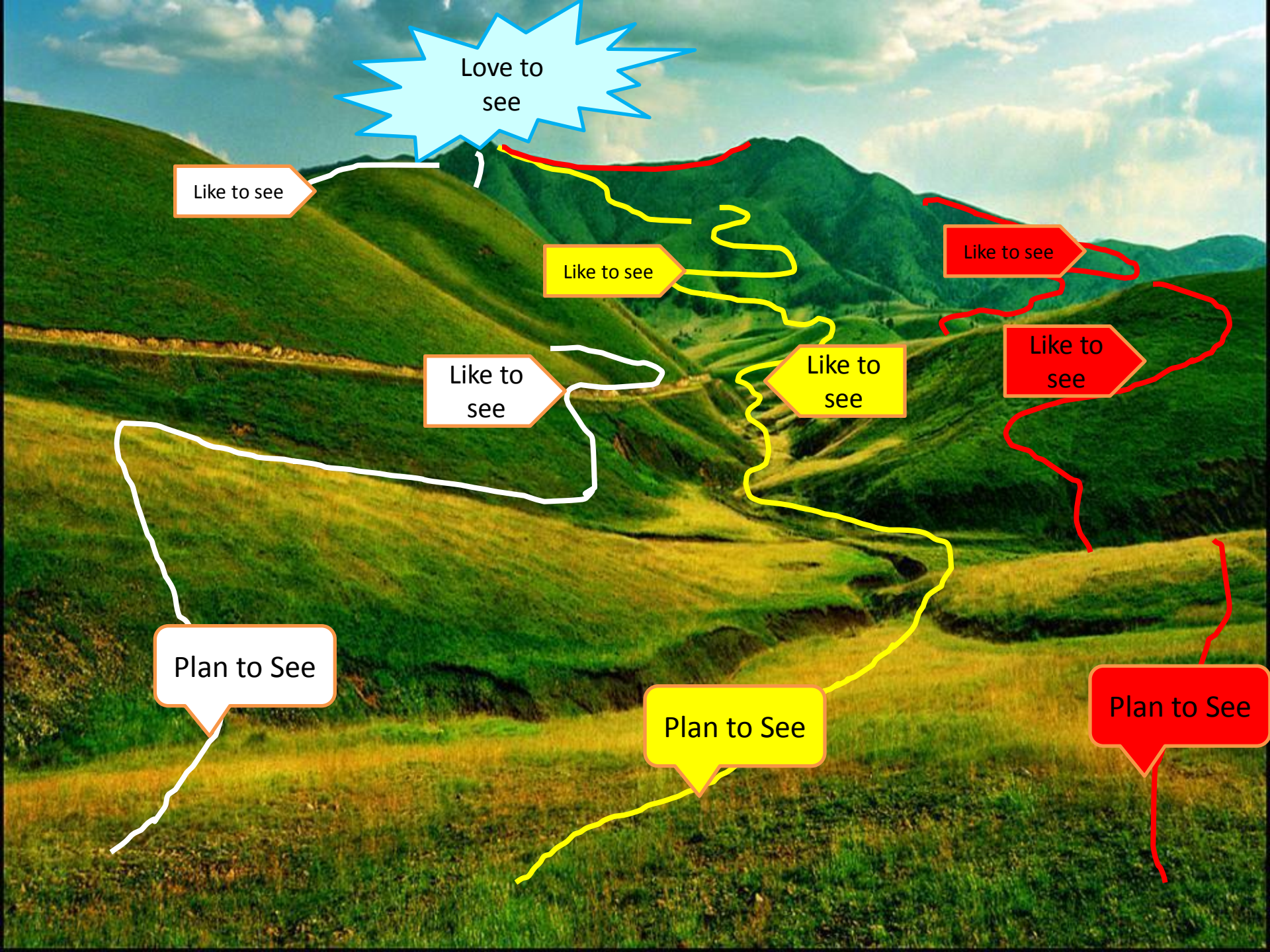
Plan to see=P1

(Preparation for the journey)



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Love to see

Like to see

Like to see

Like to see

Like to see

Like to see

Like to see

Plan to See

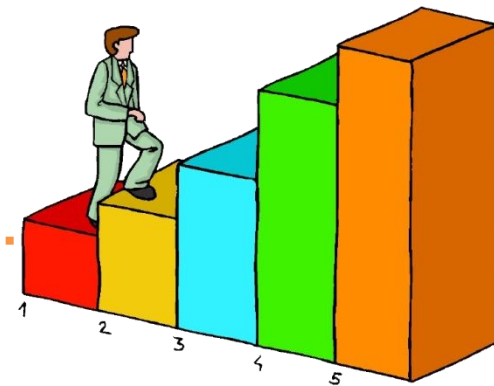
Plan to See

Plan to See



Why Graduated Progress Markers?

- Articulate the complexity of the change process
- Allow negotiation of expectations between the program and its partners
- Permit early assessment of progress
- Encourage the program to seek the most profound transformation possible
- Help identify mid-course improvements





How can we measure:

~~Greater awareness...
Empowered women...
Community ownership...
Reduced conflict...
Increased collaboration...
Governmental commitment...
Gender sensitivity...
Equal access...
Budgetary transparency...
Active participation...
Poverty alleviation...
Strengthened capacity...~~





Progress Marker Checklist

Each Progress Marker:

- ✓ Describes a changed behaviour by the boundary actor or boundary partner
- ✓ Can be monitored & observed

As a set, Progress Markers:

- ✓ Are graduated from preliminary to more profound changes in behaviour
- ✓ Describe the change process of a single boundary partner or cluster of boundary partners



What are patterns of change?

A Complementary Approach to Developing Progress Markers

Nyangaga Julius and Heidi Schaeffer

March 2011

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PMs about Changes in Behaviour

- Changes in relationships
- Changes in actions and interactions
- Changes in practices
- Changes in Policies

- Other?



A PM Framework

- P1 Preparation for the Journey: building Knowledge and Capacity
- P2 The owned journey begins: building support, collaboration and networks
- P3 The owned journey proceeds: sustained continuous actions. Institutionalization, Policies and/or Culture Change

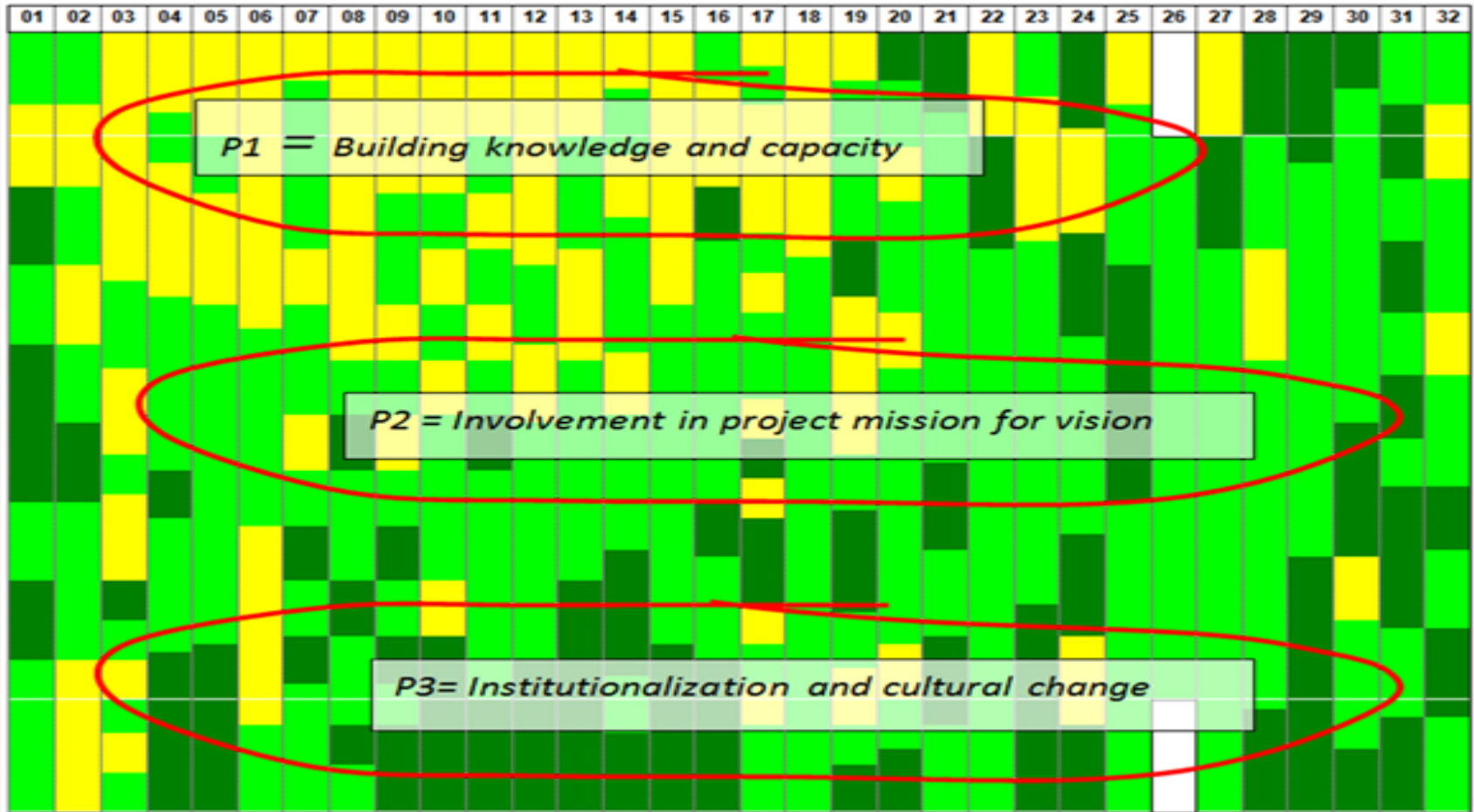


Outcome Engineering

- Level 1: Knowing that there is a journey to take (P1)
- Level 2: Taking the first Steps (P1 level)
- Level 3: Investing your own resources (all)
- Level 4: Overcoming resistance to the change (all)
- Level 5: Identifying with the journey by joining with others with a similar approach (P2 level)
- Level 6: Leaving a legacy (now an expert for others) (P3 level).



32 sets of progress markers



OutcomeMapping



P1: Knowledge acquisition processes and practices

- ...attending forums where (the project) elaborates about the technology
- ...raising questions and issues that (the Project) will address to encourage (the BP's) uptake of the technology
- ...seek out additional information on water and watershed issues from external sources
- ...requesting position papers from the relevant departments to solicit input into decisions



P2: Getting involved, build support & enroll others

- ...brokering or developing partnerships with other agencies to take local action
- ...establishing mechanisms to share and review work programmes across departments, especially on research projects
- ...establishing and expanding the membership base of the national organization in Indonesia
- ...organize 'popular education' to increase critical thinking of their members



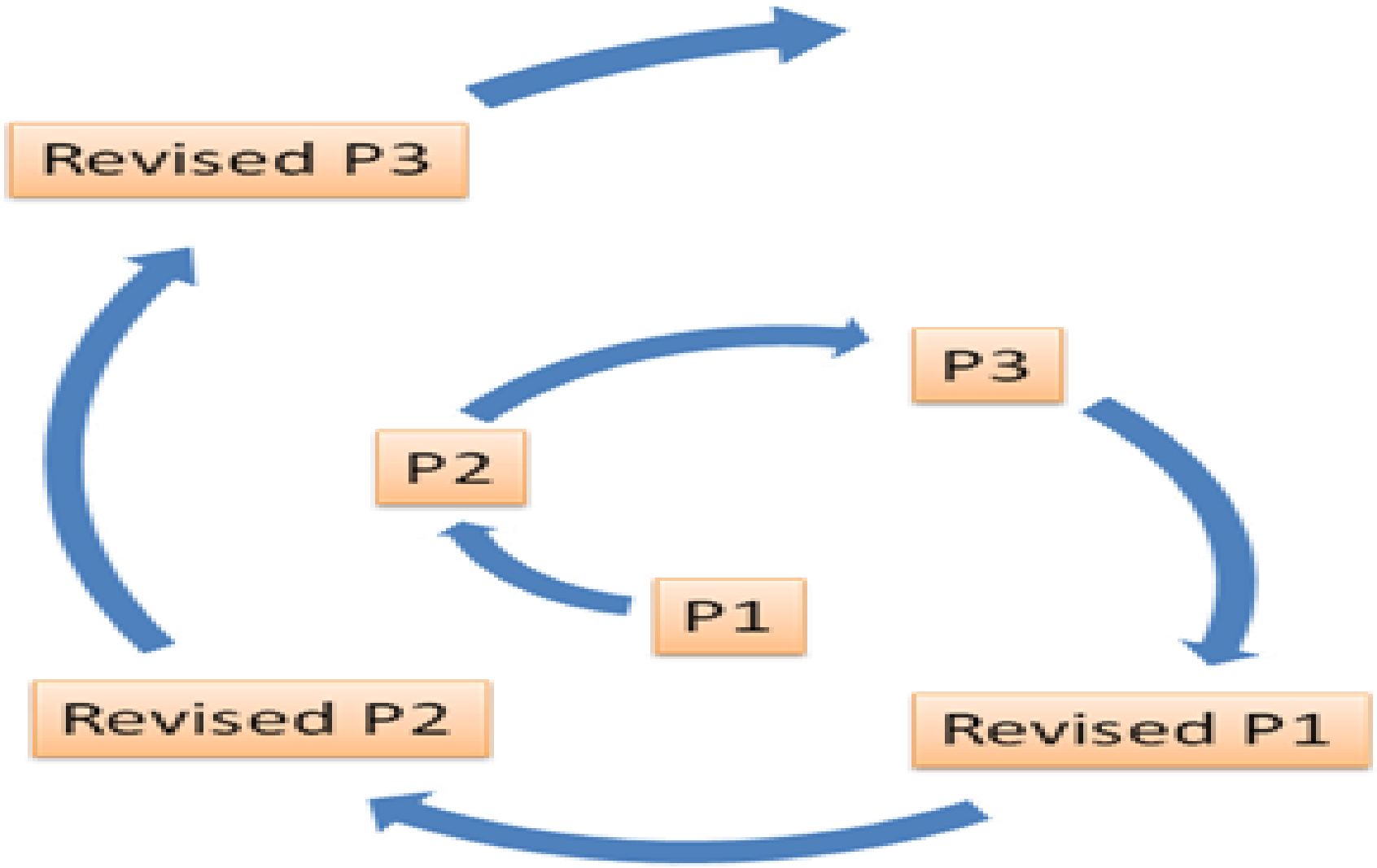
P3: Owned journey

continuous and sustained

- ...contribute to the improvement of the methodology internationally to continually make it even more effective
- ...generate their own funds and re-invest in (related) community projects
- ...developing and putting in place a communication policy guiding how information is shared within the organization



Change is continuous



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PM Paired Exercise -10 min

Break into pairs by numbering 1,2,1,2,1,2 etc.

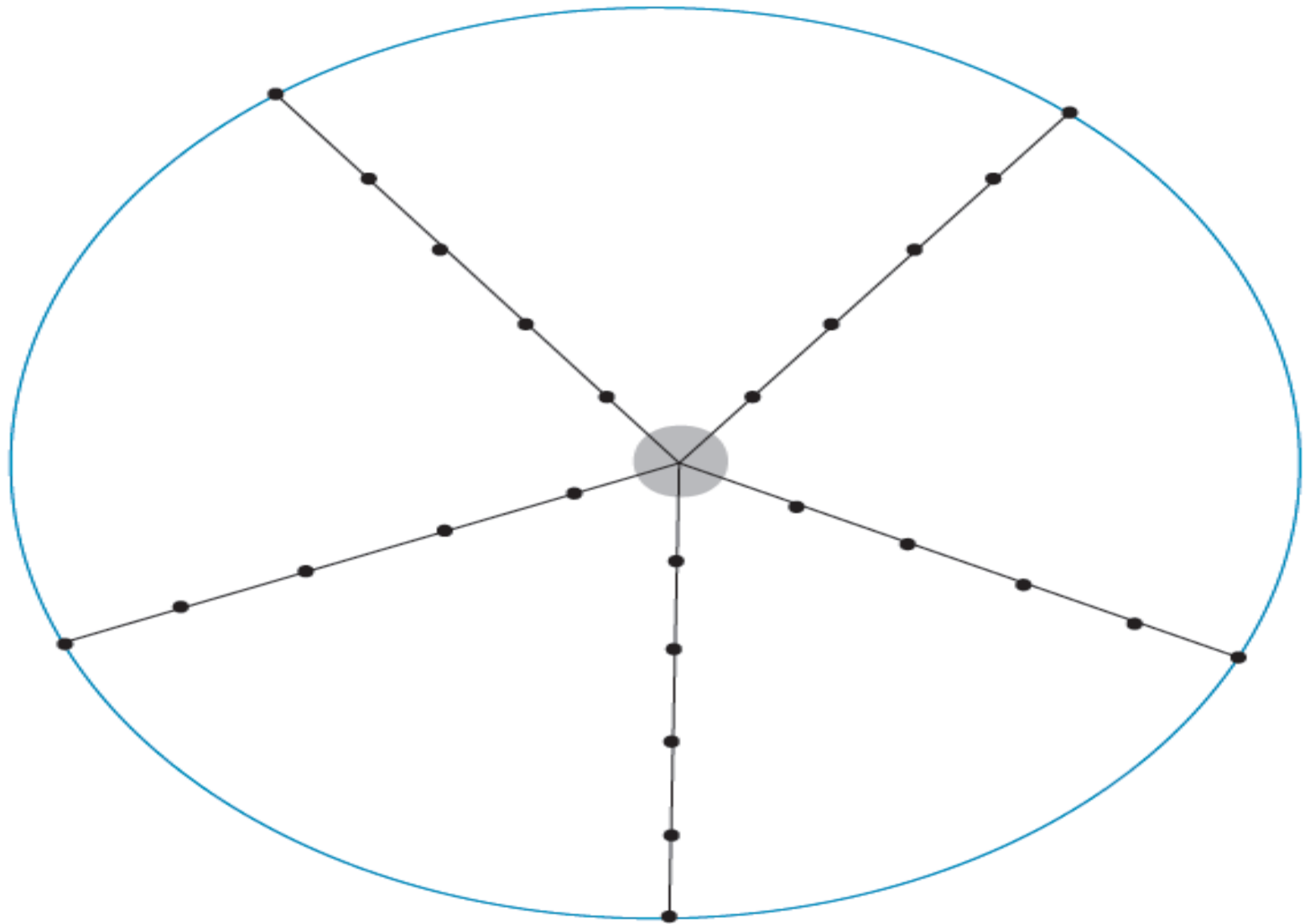
- Group 1 Village Srae Ktum Review , ▲ PM V3
- Group 2 Village Bu Til Review /change PM V 4
- Group 3 Village Bu Rangol & Laoromiet ▲ PM V8
- Group 4 Village Bu Trom Review/change PM V9
- Group 5 Village Laokar Review/change PM V12

Exercise:
Essential Criteria for
Useful Progress Markers
to Capture Results



Socratic Wheel Tool

- integrates quantitative and qualitative information,
- gathers individual information and perspectives as well as group assessments,
- involves participants in assessing and contextualizing the findings as they are created,
- is sensitive to cultural differences,
- has greater diagnostic rigor than many traditional participatory methods, and can be scaled up for more rigorous analysis,
- Adapt for particular evaluation question and context.





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- PROGRAMS
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- NEWS



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ABORIGINAL-FOCUSED PHILANTHROPY

[Home](#) » [Programs](#) » [Sustainable Food Systems](#)

Sustainable Food Systems

Canadians increasingly understand that a resilient and sustainable food system must address not only the economic wellbeing of producers and consumers, but also environmental impacts and human health outcomes. Local, diverse, and ecologically sustainable food initiatives are multiplying across





Food System Case Story

2 NGOs, Meal Exchange and Sierra Youth Coalition coordinate student efforts on ten university campuses with the aim of changing university food procurement policies to support local, sustainable food systems.

Applied student research will be used to increase the collective understanding of local, sustainable food procurement.



Food System Case Story

A broad objective of the project is to bring together students and organizations addressing food issues in universities.

This will take place through increased effectiveness of work through the formation of campus food strategy groups and campus food 'charters' that set out guiding principles for sustainable food service.



Initial Evaluation Questions

- 1. Is the work affecting campus food procurement networks?
- 2. What lessons are we learning about our strategies and what is working well?
- 3. What changes are the campuses, MX, and SYC making together through the project?
- 4. What effect are the changes likely to have on our organizations (MX and SYC), our network of partners, and the broader FS movement?



How We Started with OM

<https://docs.google.com/document/d/1CYaqxwJGSi8KaqWfVLZy-Dbh8FnS8HrNDrgwWPYL-ho/edit>



Participatory Mapping with BPs



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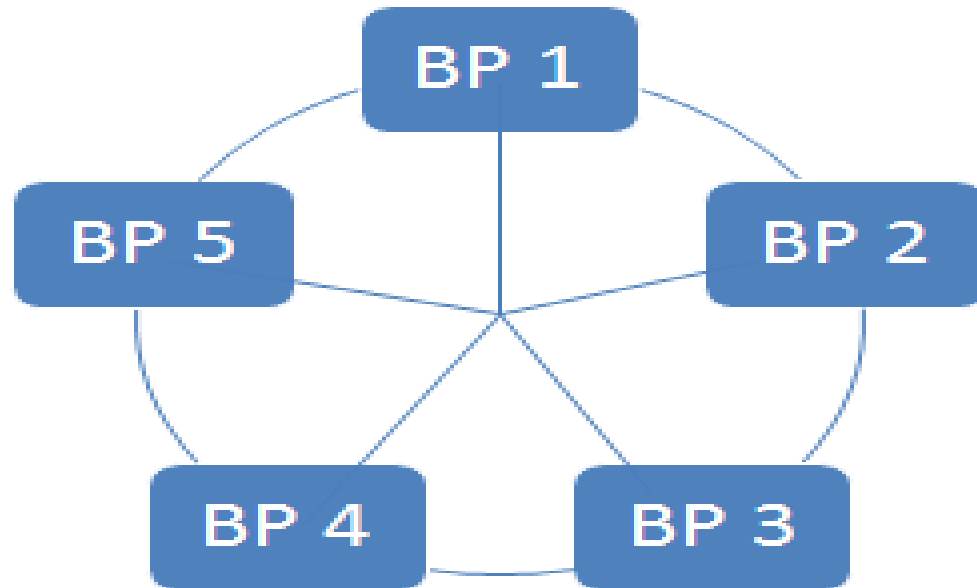


Actor-Centred PM&E

The multi-stakeholder approach allows me to see this work in its complexity and the importance of understanding and working with people on the ground to make change. But also, to focus on fruitful relationships who actually want to support the work we're doing and will be leverage points for us



Baseline Institutional BPs





PMs for Institutional BPs

- 1=accept an invitation to participate in a meeting
- 2=request further information and share information with their colleagues
- 3=regular attendance at meetings
- 4=commit to work on a shared project/goal
- 5=appoint representative to the group or a formal committee with defined terms of reference



Progress Marker Tracking

CFSG Progress Tracking Template - Fall 2012 - 2nd Cohort



Challenges of Actor-Centred

“In our introductory relationship building we are encouraged to listen, state where we're coming from, that we're here to support, and not offer too much direction. Sometimes this is perceived as "wishy-washy" and our food services and contract service director would like clarity on what specifically we want.

How can we be specific, yet receptive at the same time?



Canada World Youth Evaluation

- Knowledge; Organizational and Communication Skills; Learning Skills and Technical Skills
- 0=No Impact
- 1=Very Small Impact
- 2=Small Impact
- 3=Moderate Impact
- 4=Important Impact
- 5=Very Important Impact



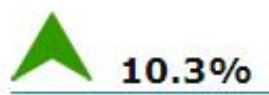
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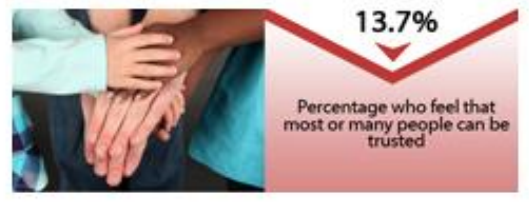
Community Vitality



GOOD CHANGE



BAD CHANGE



Back



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[HOME](#)

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Our Vision: Dialogue and collaborative inquiry to effectively engage people and mobilize evidence in a complex world



Skillful Means: Flexible tools and grounded theory to support participatory action research, planning and evaluation
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People: A world of facilitators, researchers, and institutions brings a shared vision to the world.

Liberating Structures

INCLUDING AND UNLEASHING EVERYONE

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Liberating Structures Menu

Five conventional structures guide the way we organize routine interactions and how groups work together: presentations, managed discussions, open discussions, status reports and brainstorm sessions. Liberating Structures add **33 more options** to the big five conventional approaches.

“ *Any one LS can change a meeting. Together they can liberate and transform an entire organization.* ”

The menu below represents version 2.1 of Liberating Structures. If you are new to LS, we recommend that you start practicing with the simplest (e.g. [1-2-4-All](#), [Impromptu](#)

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Let's Continue the Learning on the OMLC

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