



**Discussion Summary: Calling OM Trainers, 2<sup>nd</sup> – 6<sup>th</sup> July 2006**

**Discussion on the OM Community Map:**

The image shows a world map with several callout boxes pointing to different geographical locations. Each callout box contains a small profile picture of a user and their comment. The callouts are as follows:

- North America:** Reply 4: Be realistic, prepared, and creative. Daniel R, Switz.
- Europe:** Question: Experience of running a 2 day OM training? Ben R, UK.
- South America:** Reply 3: Too short, so be very strategic... Terry S, Canada.
- Canada:** Reply 2: Be prepared and be focused! Kaia A, Canada.
- Kenya:** Reply 1: Good, but tight on time Julius N, Kenya.



### Discussion Summary: Calling OM Trainers

Prepared by Ben Ramalingam

6<sup>th</sup> July 2006

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=30>

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#### Original Email

[Ben Ramalingam, UK](#)

2<sup>nd</sup> July 2006

Dear All,

I have been doing some work with the British Overseas NGOs in Development (BOND), and they are interested in providing an OM training course to UK NGOs in the Autumn.

This will also serve as a UK focused community meeting, as we will be using the [www.outcomemapping.ca](http://www.outcomemapping.ca) platform as a key resource to continue discussions after the event, and to strengthen OM-related networking across the UK.

The only issue is the timing - we would be looking at a two day course, which is shorter than pretty much all of the courses I have heard of. Does anyone have previous experience of delivering OM training in a multi-stakeholder setting over two days? Do you have any tips or tricks to share with me? Any inputs would be greatly appreciated.

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#### Responses were received, with many thanks, from:

1. [Julius Nyangaga, Kenya](#)
2. [Kaia Ambrose, Canada](#)
3. [Terry Smutylo, Canada](#)
4. [Daniel Roduner \(two responses\)](#)

#### Summary of Responses:

1. In Kenya, [Julius Nyangaga](#) ran a two day course for researchers who wanted to include OM as a means of improving communication and uptake into policy. As Julius described it, *"it was not quite perfect, and many took a bit of time in getting the lessons in such a rushed way, but they all really appreciated the concept"*.

##### On Day 1

- use a powerpoint-based on what Outcome mapping is and its purpose
- Develop a draft Vision and Mission statement for the Project, to be later to be refined by the Project leaders, and circulated to the group for suggestions and comments
- Brainstorm Boundary partners who are crucial for achieving the Project Mission. (about 6 categories of boundary partners were generated)
- In the afternoon, split into groups, and work through one boundary partner as a means to explain outcome challenges, progress markers and strategies and how they are related to the project Vision and Mission.
- Allocate the remaining boundary partners to the groups; with a preferred maximum of 2 BPs per group. Set Homework assignments for the groups to work through boundary partners, and brainstorm Progress Markers and Strategies.

##### On Day 2

- Each group to presented Progress markers and Strategies for each boundary partner, followed by group discussions helped to correct and improve the analysis.
- In the afternoon, work through Organizational Practices, Monitoring and Evaluation.
  - o *"Overall, Day 2 was tight and the groups only skimmed over the last two concepts."*



2. [Kaia Ambrose](#), who had just done a two day course in Costa Rica with Natalia Ortiz, drew from this and a wealth of previous OM training experience to suggest the following things which worked well in her session:
  - a pre-course profile of participants as well as their expectations in order to tailor effectively.
  - spend about 2 hours introducing OM, as well as identifying participant perceptions on M/E in general (e.g. challenges, what are their needs for M/E and what characteristics a good M/E system should have).
  - Do Vision and Mission relatively quickly so that you can do group work and dynamic exercises around the next three steps
  - Focus on Boundary Partners, Outcome Challenges and Progress Markers
    - o *"I find this is the essence of OM and behavioural change, and participants often have the most questions around these three "steps".*
  - After individual group work the three key steps, work through the strategy map as a whole, and then go back into groups to identify a few examples of Oganizational practices.
  - if there is time, it is useful to "bring it all together" by asking the group: "where do you think OM is useful in your organization, where is it not useful, where would you encounter challenges in applying it and how would you overcome those challenges?"
  - A key challenge was doing justice to the M&E component without rushing over it
  
3. [Terry Smutyllo](#), who has done OM training sessions in sessions ranging from two hours to five days concurred that two days was too short. He raised the issue of the goals of the training session, and if these were to have people start using the method with some accuracy, grow in competence and champion it in their organizations, then his recommendation was five separate strategies. Terry also suggested that *"if the participants are from different organizations, try to manage participation to maximize common ground. Ideally... have several people from each organization so they could work on their real work together. Failing that, group people based on similarities of outcomes and strategies their organizations use."* Terry's five suggested strategies for dealing with a 2 day workshop are summarised in the strategy map below.

Strategy Map: Delivering a 2 day OM workshop<sup>1</sup>

STRATEGY	CAUSAL	PERSUASIVE	SUPPORTIVE
STRATEGIES AND ACTIVITIES AIMED AT A SPECIFIC INDIVIDUAL OR GROUP	I1: Require that attendance at the the two day OM workshop be either preceded by, or followed by, some faciitated practical, applied OM work	I2: Have enough mentor/facilitators on hand so that coaching is available to individuals and break out groups throughout the sessions.	I3: make post-training coaches available for follow up support to those who start using and have questions or get stuck.
STRATEGIES AND ACTIVITIES AIMED AT INDIVIDUAL OR GROUP'S ENVIRONMENT	E1 - None	E1: initiate a dialogue with the heads of the participants' orgs about opening up space for experimenting with the new methodology.	E3: get a funder or two on board to support use of OM.

<sup>1</sup> Note: For more information about the strategy map process, look at the OM Manual via the following link: <http://www.outcomemapping.ca/resource/resource.php?id=83>



4. Last, but certainly not least, [Daniel Roduner](#) made a strong case for clarifying the purpose of the two-day training, as follows:
- The participants wish to have a general understanding of OM
  - The participants wish to build their capacities in applying OM through their first training s
  - The participants wish to have a basis for assessing the possibilities / needs for applying OM in their daily work or project/programme
  - The participants want to be able to apply OM within their own project

Daniel suggested that in a 1-2 day workshop, the first three objectives could be met, but longer is required to train 'OM experts'. After short training sessions, Daniel found that participants had an understanding of OM, were able to assess strengths & weaknesses of OM, and are able to assess the potential use of OM. However, most would still need an OM-facilitator for applying OM as a planning, monitoring and evaluation tool.

Daniel also strongly supported Kaia's response, with particular emphasis on the pre-course profiling. He made the additional point of needing to spend some time on 'OM language', especially on terms which have a common understanding (outcome, vision, mission) which differs from the way they are used in OM. He agreed with the focus on the three key steps, but also maintained that vision and mission needed to be understood well. Daniel also made the suggestion of using "carousel" workshop methods to exchange the results of analysis, for example, the strategy map. With Organizational practices, Daniel asked for 1 example of each of the 8 practices from each group, which made for a good overview of potential practices. Finally, on M&E, Daniel asked each participant to write at least 2 cards of perceived strenghts / weaknesses of OM in relation to their existing P, M&E tool (this is a quite short exercise and brings the group together after all the individual group-work). Clustering the answers enabled Daniel to see if there was a need for further clarification or discussion, and also to concentrate on strengths in order to talk about 'potentials' of OM in their programme/project work.

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### **Summary of Response from Discussion Initiator:**

[Ben Ramalingam](#): First of all, many thanks for all of your valuable inputs and experiences. I have realised the importance of being very clear as to the objectives of a 2 day OM workshop, as well the need to be very realistic with regards to the participants learning aims... I have also amassed a wealth of tips and tricks which I will definitely be applying in the session.