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Welcome!

Welcome to the first newsletter of the Outcome Mapping Learning Community. We hope this will be interesting for both our members and also others who are interested in Outcome Mapping. These bi-annual newsletters are meant to keep our members informed of community activities but also provide a launch pad for disseminating the wealth of experience and knowledge created by the community.

The Outcome Mapping Learning Community is a global group of over 700 individuals – see the map opposite – dedicated to collective learning and sharing of knowledge around Outcome Mapping. It was formed in 2005 and has been steadily growing since then. It is supported by the International Development Research Centre (IDRC) and managed by the Overseas Development Institute in London.

www.outcomemapping.ca
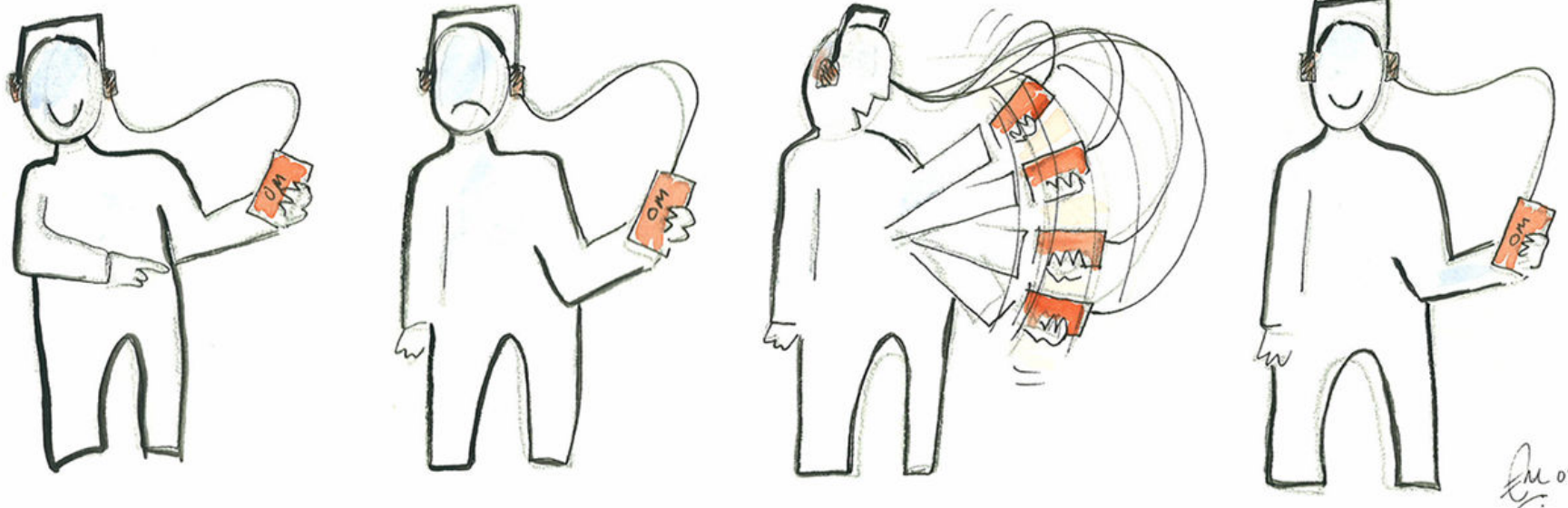
Outcome Mapping in Action

Belgian International NGO adopts Outcome Mapping

By Stef Deprez, VECO Indonesia

For several years Vredeseilanden has used the Logical Framework Approach as its planning, monitoring and evaluation tool. However, the organization has experienced several problems related to the use of this tool, including but not limited to the strong emphasis on quantitative definitions of objectives and indicators, a result & report-oriented focus of the M&E process - mainly to meet the accountability needs of its main donor - and limited application of the tool to facilitate learning and mutual accountability.

Reviewing progress markers at a programme design workshop

The new Vredeseilanden programme 2008-2013 created an opportunity to move a step further and VE decided to adopt a more learning-oriented M&E process. It was inspired by the philosophy and approach of Outcome Mapping (OM) and chose to embrace it as the guiding framework for the design of its new global programme. The respective M&E system is referred to as the *Planning, Learning & Accountability* system (PLA) to highlight the aspirations to move beyond the more conventional M&E process it was used to.

Vredeseilanden (VE) is a Belgian NGO, represented in 13 countries in Africa, Asia and South-America. It aims to contribute to viable livelihoods and empowerment of organised family farmers, male and female, in South and North by improving their position in the whole agricultural chain, from production to consumption, improving policies at national and international level and stimulate consumer buying practices for more sustainable consumption.

The intentional design stage in the different countries followed the logic and flow as suggested by the OM manual. However, as is often the case, some customisation was necessary to comply with internal and external requirements. The most important of which was the donor requirement to use a logframe-based format for the programme proposal and future reporting. This induced an intensive process of 'bricolage' to integrate the two different models.

The key for VE was to identify boundary partners for each of the four logframe objectives and subsequent outcome challenges, progress markers and strategy maps. In other words, an OM framework was developed for each of the logframe objectives whereby the result level describes the changes of the respective boundary partners and links with the respective outcome challenges. However, it is clear that the attempt to match the two models required a twist of both. The fact that the programmes are built around the objectives, which focus on changes at the beneficiaries level, implies that VE will include impact monitoring in its M&E system.

Another interesting deviation from OM concerned organisational practices. VE did not use or formulate the organisational practices as proposed by OM. Instead, VE developed an outcome challenge for itself including progress markers – resonating with the OM organisational practices - which reflect the gradual steps of VE towards integrating

learning into its organisational practice & culture. By doing so, VE aims to incorporate aspects of its own development process into the M&E process.

Through its particular logic and set-up, OM facilitated critical self-reflection on the previous and existing programme objectives, approach, structure and assumptions on which the programme was built. This in itself was already a valuable process for many country offices. The concept of boundary partners turned out to be very helpful in establishing a greater variety of partners as well as to explore a wider scope of strategies for capacity development of its partner organisations.

> In 2008, VE will invest in developing a practical and useful M&E framework based on OM which aims to support the planning & management processes of VE, facilitate organisational learning and fulfil its accountability requirements.

OM also inspired the assessment of its internal organisational processes. Seeing the country offices as boundary partners of the management & support services of VE head office resulted in an outcome challenge (+ progress markers) for the country office as well as respective strategy maps for the management & support services of the VE head office (e.g. finance, HR, communications) which will be used as the basis for an intra-organisational planning, learning & accountability system.

VE chose OM as a guiding framework because it believes that, inherent in its design, it has the potential of developing a more learning-oriented planning, monitoring and evaluation process. In 2008, VE will invest in developing a practical and useful M&E framework based on OM which aims to support the *planning* & management processes of VE, facilitate organisational *learning* and fulfil its *accountability* requirements.

VE has realised that adopting OM as a guiding framework, is not just a 'panel beating' exercise but can be more compared to an 'engine overhaul' which requires not only a mind-shift of the people involved but also induces changes at organisational and operational level such as the programme management approach, the M&E process, operational planning and programme structures & procedures.

> Adopting Outcome Mapping can be compared to an engine overhaul; it requires not only a mind-shift of the people involved but also induces changes at organisational and operational level.

It became clear that it was crucial to install OM champions in the organisation, provide specialist support, create space to continuously communicate and internally promote the OM logic and move step by step into the integration process. So far, Outcome mapping has been an interesting, promising but also challenging adventure.

Contact Vredeseilanden:

Teopista Akoyi, Programme Manager, teopista.akoyi@vredeseilanden.be

Christ Van Steenkiste, PLA Coordinator, christ.vansteenkiste@vredeseilanden.be

Outcome Mapping in Research

Why researchers in Kenya are using Outcome Mapping to move beyond traditional research activities

By Julius Nyangaga, Innovation Works, ILRI, Kenya

Outcome Mapping is well known as a flexible tool and has been applied in many different contexts, themes and regions. One group of users who have found value in Outcome Mapping is researchers. We want to suggest three reasons for this. Firstly, OM is a process that enables researchers to see how their efforts and products could be relevant in a complex system. Secondly, it helps researchers work with stakeholders effectively in linking the knowledge they generate to action. Thirdly it allows researches to map out progress when their products are appreciated.

However, experience at ILRI (the International Livestock Research Institute in Kenya) has shown that applying OM in research projects is not without its difficulties. The problems are rooted in the fact that research is traditionally focussed on designing solutions rather than implementing them. As much as the ultimate goals of research closely match those of counterpart development projects, researchers find themselves a little removed from actual knowledge application and adoption. Finding a working solution that the researchers feel is adequate for sharing takes much exploration time, and in many instances effective solutions are not so readily forthcoming. Yet there is still the same pressure from investors and benefiting stakeholders to deliver results.

Take the example of researchers working on a vaccine against a poultry disease that is hampering chicken rearing in a rural community. The nature of such research usually means that the vaccine may not be immediately available, and even if it was, effective adoption will require interaction among several actors in conducive environments to support its use. To deliver their stated goal of disease control to benefit the poor, the researchers are faced

> The challenge researchers face in OM application is how to show how their targeted benefiting communities will benefit from their work

with having to operate beyond the traditional laboratory setting and in roles far removed from disease investigation. The researchers now have to interact with other actors to cause behavioural transformation and institutional environments that will deliver their stated project goals. The influence of researchers in effecting their projects' impacts is challenged by the much wider range of actors involved, greater scope of political interests, as well as economic factors vital for affordable vaccine distribution and uptake – factors that influence access and acceptance by targeted households.

A development project on the other hand, for example an NGO that wishes to assist the rural community in question, will find the time gap between solution identification and implementation much narrower. It is much easier to take the vaccine and promote its use because it is already been tested and tried and results at household level can be realized much faster. From the onset the NGO will find it easier to identify agents to work with to effect actual implementation – actors whose transformation (their project outcomes) will have a more direct implication in adoption of the vaccine. These boundary partners may include the chicken keeping farmers or groups, local practicing veterinary agents and the vaccine distributors.

The challenge researchers face in OM application is how to show how their targeted benefiting communities – farmers, traders, rural populations, the poor or disadvantaged, conflict victims etc. – will benefit from their work.

Outcome Mapping defines boundary partners as "…those individuals, groups, or organisations with whom the programme interacts directly and with whom the programme can anticipate opportunities for influence". The target communities mentioned in researchers' vision statements cannot possibly constitute the boundary partners they will work with in their projects. Researchers may find it easier to select intermediary agents, such as policy makers, technical advisors, regulatory agents, extension agents, and even private business agents as their boundary partners.

The question is how social, behavioural, and institutional change in these intermediary actors will be an indication of positive change in the ultimate beneficiary communities. How does one demonstrate that changes in the attitudes, activities and ways of working of, for instance policy makers, will imply greater nutrition in children or greater incomes to rural women farmers? How do the researchers then convincingly demonstrate that such outcomes are contributing towards their vision?

Fortunately, many research and development groups are now acknowledging that progression towards a desired direction in a system is a continuous process involving every actor in cyclically linked phases of problem identification and exploration, testing and adoption, adaptation and wider scaling. In each of the phases, researchers are constantly identifying partners who support their investigatory efforts, help test their outputs and address possible constraints to output application.

In the process researchers are now realizing that they have to go beyond their plain investigation functions to achieve their goals. A recent report exploring successful ILRI research cases from an OM perspective (Research Beyond Borders, 2006) shows that project teams are involved in activities ranging widely from the technical to cultural to political; exploiting rare innovative openings and managing communication constraints. For example, the study found that when researchers involve the users of the research outputs early in the project, there is enhanced relevance and acceptance of the research intentions and the probability that outputs will be used is increased.

Researchers are now realizing that they have to go beyond their plain investigation functions to achieve their goals

In this manner OM is providing the means to recognize and declare subtle changes in target communities that indicate early success in achievement of research goals. An example, in one of the ILRI research cases reported, is communities opening up and sharing knowledge with researchers and participating in the investigation, especially in defining the problem and co-creating solutions. In some cases they were even involved in testing and adapting research findings, evaluating interventions and disseminating research findings. The communities also engaged key stakeholders that researchers found difficult to link with, for instance lobbying local influential political structures.

Outcome Mapping is proving to be an invaluable addition to project planning, implementation and monitoring of progress and performance. Many researchers are incorporating its concepts in their working structures, alongside other traditional frameworks such as logframe analysis, to particularly enrich the process of designing, implementing as well as elaborating the qualitative transformation of a system. As an evolving methodology, researchers are invited to document and share objective experiences so that the process – as a theory of change – gets grounded in more convincing empirical evidence.

Contact ILRI:

Julius Nyangaga, j.nyangaga@cgiar.org

# Knowledge Exchange: Hopscotch your Progress Markers

One of the main motivations behind the Outcome Mapping Learning Community is to share experiences and to support the global use of OM. A recent example of such an exchange came from one of our members in Thailand, Weeraboon Wisartsakul, who asked for ideas of games to play in an OM workshop. The following is an idea suggested by Javier Pacheco in Columbia. See the community forums for the full version of the exchange.

The concepts of outcome challenge statements and progress markers are sometimes hard for people to grasp, particularly the idea of progressive changes in behaviour. This game is designed for use in workshops to clarify these concepts.

It is based on the popular children's game 'hopscotch' where you have to throw a stone onto a grid and hop down the grid skipping over the stone (see wikipedia.org/wiki/Hopscotch for details). In the Outcome Mapping version, participants construct their progress markers on the grid, starting with their 'expect to see' statements and ending with their outcome challenge. The grid shape will vary with each instance but will look something like the one in the example below (grey boxes are 'expect to see', green 'like to see', yellow 'love to see' and red is the outcome challenge).

Laying out the 'hopscotch' grid
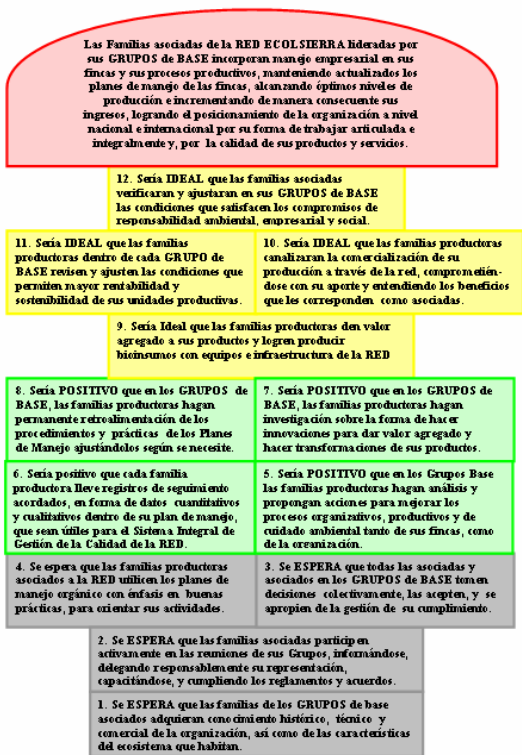
An example grid of progress markers and outcome challenge statement

Representing the statements in this visual way demonstrates that it is unrealistic and often risky to expect our boundary partners to make the leap from 'expect to see' statements to the outcome challenge. It also helps to identify the intermediate steps needed to get across the grid safely and smoothly.

To run this exercise in a workshop, follow these steps:

1. Draw out a standard hopscotch grid - this may need to be adapted later on to accommodate the particular set-up needed.

2. Ask the participants to write the outcome challenge (for a chosen boundary partner) on coloured card and place it at the top of the grid.

3. Ask one participant to jump from the start of the grid to the end (outcome challenge) in one leap. If they manage it, it will be very difficult and risky, but they will most likely fail.

4. Explain that boundary partners will rarely reach the outcome challenge in one leap but will get there gradually.

5. Ask the participants to write down a range of progress markers on coloured card (using three colours like the example) and place these on the grid to represent the boundary partner's route to the outcome challenge.

6. It can also be helpful to relate the strategies to the hops - what is it that the programme will do to help the boundary partner get from one square to the next.

New resources in the community library...

Frequently Asked Questions (FAQs) about Outcome Mapping

A summary of some of the most common questions asked about Outcome Mapping
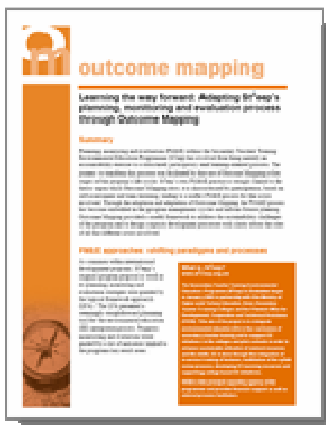
Also available in French & Spanish
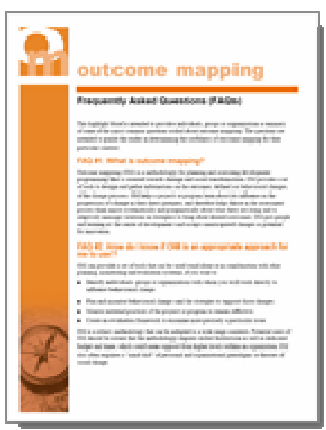
Exploring the science of complexity: Ideas and implications for development and humanitarian efforts

An ODI Working Paper

Learning the way forward: Adapting St2eep's planning, monitoring and evaluation process through Outcome Mapping
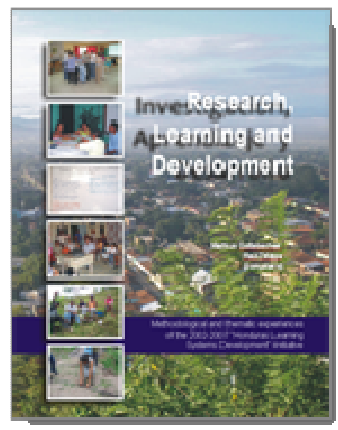
A look at how the St^{2}eep project in Zimbabwe used Outcome Mapping in its PM&E process.

Also available in French & Spanish

Outcome Mapping: The Experience of its Application in Honduras

A chapter from a book about the 2002-2007 "Honduras Learning Systems Development" Initiative.

Also available in French & Spanish

Have you read the latest community publication?

Making Outcome Mapping Work:

Evolving Experiences From Around the World

A year of discussions from the community summarised and synthesised by Harry Jones. Available in the resource library. *French and Spanish versions available.*

Meet the Stewards

The community stewards are the core group of members who run the OMLC in collaboration with the secretariat. They are involved in planning community activities, advising and supporting our members and providing strategic direction for the community. In order to get to know the stewards, we thought we'd interview a couple of them.

First up is Kaia Ambrose…

Who are you? I'm currently wearing a couple of hats. I work as the M&E and Learning Resource Person at CARE Canada; I'm mostly involved with "bringing M&E to life" and balancing accountability and learning, with several, small projects that are funded under CIDA's Partnership Branch. I still take time out for freelance work though, mostly around Outcome Mapping (applications, trainings, developing materials), with a number of different organizations.

One interesting fact about yourself… I love to cook! My dinner guests are my boundary partners....and everything from the meal itself, to the ambience in the dining room, to ensuring that I support local farmers (so I can continue to buy the freshest ingredients possible) constitute my strategy map!

If you could take just one aspect of OM what would it be? Circles or spheres of influence. I think it sends a message that many organizations need to pay more attention to: who are we really working with, who and what can we possibly try and influence, and therefore, let's be clear on a) what we mean when we say "impact" and b) when, where and how will we focus our monitoring and our evaluation.

What advice would you give to someone just starting out with OM? You don't necessarily need to attend an OM training in order to understand and apply OM - try it out on your own and use the Outcome Mapping Learning Community for support!

What's the most interesting application of OM you've come across? St2eep Project in Zimbabwe - because they are dedicated and consistent, have created a space to experiment and learn from M&E, and have balanced the practical application of OM with a systematic look at the different supporting theories behind OM.

Next we have Daniel Roduner…

Who are you? I work for Agridea, the Swiss Centre for Agricultural Extension and Rural Development, in the Team for International Cooperation. We combine thematic with process competences and always explore new ideas, new ways of doing things. Since 2005 I have been offering short (and longer) trainings on OM and have been involved in building OM principles into planning and / or M&E systems and activities of many different contexts, projects, programs and organisations.

One interesting fact about yourself… Outcome Mapping is like white-water kayaking in the Swiss mountains. I need several partners for organising the trip; I can plan everything well, and as soon as I am on the river, things change. I still need to know that there is a safety net (my paddling colleagues) but the river changes from one instant to the other; so my strategies must change and adapt to what the river is doing. Constant monitoring is needed for adapting my activities, and clear roles and responsibilities need to be defined, so no one is lost or hurt. Nevertheless, the vision to have a safe and fun trip remains, only the strategies must be adapted to new situations.

What is your interest in OM? My interest is pragmatic and practice-oriented. A method remains a method, a system remains a system; it is the people, their perceptions and their way of doing things that can change the world. OM can help project teams and organisations improve their way of doing things. For this reason, the system must remain a supportive tool, and not become a goal itself.

If you could take just one aspect of OM what would it be? The clear distinction of roles and responsibilities. In my experience, many (not OM planned) projects and programs fail to define clear roles and mingle the responsibilities of local actors and the project team, which usually results in a disaster once the 'project' is facing first challenges. Additionally, the distinction of a temporary support actor (the project team) from ongoing responsibilities in a local context, helps planning the 'end of project status'; i.e. the project does not take over activities and services that should be provided by local actors.

What advice would you give to someone just starting out with OM? Understanding the underlying concepts and perceptions are the first step of starting with OM. Once you want to introduce OM into a program, project or organisation – invite an OM user / expert, the method will easier become a living thing and not just a 'written approach'.

The other stewards are Beatrice Briggs, Julius Nyangaga, Natalia Ortiz, Ben Ramalingam and Heidi Schaefer.