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Foreword

“One thing about change, you can count on it!” *unknown*

When IDRC published the manual *Outcome Mapping: Building Learning and Reflection into Development Programs* in 2000, the Evaluation Unit hoped that it would prove useful to the development researchers with whom the Centre works. We did not anticipate the strong response it would receive. The challenges we were facing in planning, monitoring, and evaluation were shared by many people, working in different sectors, all over the world. Outcome mapping has brought us in touch with many of these people and the methodology is richer as a result.

The idea of the outcome mapping virtual learning community was simple. To develop a web space where people could network, find resources, and share experiences. What began as an impersonal technology, however, has grown into much more.

The members of the community freely share their experiences using outcome mapping (good and bad), support and learn from one another, and push forward the boundaries of thinking on the role that planning, monitoring, and evaluation can play in encouraging social change. Through these interactions, rich collaborations have emerged and a deep kinship has developed. Our diversity is our strength. Sharing insights from our different worlds -- whether it is knowledge management, research, group facilitation, participatory development or health, information and communication technologies (ICTs), natural resource management, education -- has enriched our learning.

This publication is a testament to the knowledge that circulates throughout the outcome mapping learning community. All too often virtual communities remain within the parameters of their computer screens and do not share their knowledge outside their e-boundaries. This publication will help expand the reach of outcome mapping, make the rich discussions available to those who did not participate, and encourage new members to join. It includes valuable insights into the theory and practice of outcome mapping and will be useful to the experienced and the neophyte who want to apply outcome mapping in their context.

At a recent meeting of African users of outcome mapping in Niamey, participants said outcome mapping was not simply a planning, monitoring, and evaluation methodology but also a theory of development. This publication reflects that attitude and is true to the collaborative nature and learning-oriented stance of the community from which it emerged.

Sarah Earl

*Ottawa, Canada
March 2007*



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Making Outcome Mapping Work: Evolving Experiences from Around the World¹

A brief synthesis of a year of discussions

1 Introduction

In 2006, its first full year as a formal community of practice, the Outcome Mapping Learning Community has proved a valuable resource for new and experienced users alike. Developed through a process of participatory engagement with Outcome Mapping (OM) users, the Community has helped to forge connections across an enthusiastic and knowledgeable worldwide group, by providing a space to share advice, discuss experiences, learn lessons, and explore problems and issues.

Over the course of the year, members have shared a wealth of ideas on the following topics:

- how to introduce and explain OM,
- how to organise workshops;
- how to best implement OM to suit various purposes
- how to complement OM with other tools, with a special focus on comparing and contrasting Outcome Mapping with Logical Framework approaches,
- how to advocate for OM;
- how to integrate OM where an organisation is already working with a Log Frame;
- the theoretical motivation and underpinnings of Outcome Mapping, both in general and in relation to specific elements of Outcome Mapping methodology

This report provides access to the wealth of information and knowledge. However, it is important to state that this is not intended to be read from cover to cover,

First, in the Synthesis section which follows this introduction, the lessons and ideas shared are summarised in the broad topics areas provided above. If you want to get an overall flavour of what was discussed, and the kinds of issues which are important to the community, this will be the most relevant section for you.

If, following this broad overview, there are specific discussions or topics which seem pertinent and relevant, readers are encouraged to find those discussions, to get more in-depth information. Each summary is organised in the same way, with a visual representation of the discussion, the message which initiated the discussion, short summaries of the responses received from community members, and finally concluding remarks and suggestions for actions.

For those who are particularly keen, the original discussions are available to browse on the community website at www.outcomemapping.ca. If the report is being read electronically, readers can take advantage of the hyperlinks which will navigate them to specific discussions, more information about the contributing members, and other online resources.

¹ The title of the report draws from the community slogan, chosen by members in an online poll which ran in 2006.



2 Synthesis by Topic

2.1 Advice for workshops and for introducing OM

The OM Learning Community shared many lessons about adapting one's workshop approach to suit the context in which it is being applied. The most common problem faced by community members has been that of limited time or resources to carry out a full workshop, and there are a number of possible responses. Firstly, you need to realistically clarify what participants want out of the session: it may be possible to convey a decent understanding of OM in a two or three day workshop, or even to enable them to have a good enough grasp to be able to assess the suitability or feasibility of OM for their organisation. However, it will take longer than that to bring participants with no initial understanding of OM to a level where they are ready to apply it as an M&E framework. Once the aims of the workshop are clear you can decide which elements are the most crucial for your purposes, and which boundary partners are feasible to accommodate at different stages of the process. One approach has been to hold separate short workshops for each of the most important BP's. It is imperative to ensure that your project team have a good grasp of OM before involving others, and the process can be speeded up by drafting and circulating selected elements of the framework in advance for discussion and revision in the workshops, which enhances the level of understanding at which the participants will enter the workshop as well as focusing discussions.

It is also crucial to adapt the workshop approach to suit the local context; many members have argued that harnessing local knowledge and methods is the key to the success of development programmes. It can be useful to carefully select the language and terminology used: many members have adapted OM terms to fit in with context, often using common development terms in the local language, and preparing a glossary in advance with people fluent in it. One method of facilitating community participation is to use Transformational Attitude Interviews, Affinity Diagrams and Interrelationship Diagrams prior to the workshop, as these will feed naturally into the OM framework.

OM learning community members have shown a great deal of ingenuity in devising methods to enhance their explanations of OM and aiding workshops participants' understanding. Again, it is important to use the right terminology: you must strike a balance between using terms and phrases that are familiar to participants while ensuring that you don't depart from the key concepts underlying the OM framework. It is particularly useful to try to relate the new concepts and terms to concrete local examples as soon as possible in order to solidify understanding; some have found that holding role-playing exercises can help participants' understanding of their task as well as foster group learning. Some members have had success using visual methods to explain concepts and to define elements of the framework, for example some have used a vision picture rather than vision statement. Others have had success by explaining terms in relation to components of the LFA because many participants will be familiar with these terms, however here caution is needed, it is important not to play down the major change in perspective/paradigm that OM represents in relation to LFA (see section 'OM and LFA').

Members have also shared their experiences of explaining specific elements of the OM framework. Many members felt that it is important to press home the concept of boundary partners, as they embody the "essence" of the shift in thinking implied by OM; an organisation may have identified the key stakeholders they work with before, but what OM requires is analysing the changes in these partners as part of a project's monitoring and evaluation. Secondly, some have found it useful to



explain the progress markers and outcome challenges side-by-side, in order to highlight the differences between these concepts. Finally, many have found it useful to emphasise that the purpose of the strategy map is to ensure that your programme is doing all it can to achieve its goals, as well as pointing out that it allows you to take credit for many useful activities which may have not been monitored previously.

The learning community has been an important tool for identifying the opportunities and requirements for those wishing to understand outcome mapping and introduce it to their organisation. Through 'speed dates', and 'OM buddy' relationships, the website has facilitated the kind of personal contact and mentoring relationships that have been instrumental in embedding peoples' understanding of OM and helped their attempts to use the framework in their project or organisation.

For more advice on workshops and introducing OM, see the following discussion summaries:

- Lessons from Kenya
- Workshop in the South East
- Calling OM trainers
- Speed Dating and Outcome Challenges
- OM in Cambodia
- Tools to strengthen OM

2.2 Advice for implementing and complementing OM

Members of the OM community have used OM for a wide variety of purposes, in a diverse set of contexts. Through the learning community website they have been able to share lessons learned about implementing OM in different circumstances, and suggested a number of tools and techniques to complement the framework for a number of different contexts. OM is seen as ideal to use when working in (or evaluating) partnerships, due to its focus on the organisations you work with directly and its participatory approach, which fosters social learning between the organisations and allows them to clarify their roles. Similarly, it offers benefits when working with particularly powerful boundary partners due to helping clarify the complementary aims, roles and responsibilities of your organisation and the powerful partner. Community members have found OM well-suited to advocacy work by it ensuring that a programme is specific about the actors it targets, the changes it wants to see in them, and how these changes might be achieved. It is also appropriate for assessing the impact of research on policy for similar reasons.

There are also a number of tools and techniques that have been gathered, which community members have found can complement OM extending its power and reach. Firstly, members have found 'Naming the Moment' a useful complementary tool, in particular for advocacy work, since it ensures that an organisation defines *itself* and its own position before looking to influence others. In order to foster community participation, and to enhance OM's accessibility to local stakeholders, OM users have found Transformational Attitude Interviews a useful tool to use prior to OM workshops, as well as visual tools such as affinity diagrams and interrelationship diagrams. Members have found the 'Spheres of Influence' and 'Influence Mapping' tools are useful to help determine who your boundary partners are, 'Most Significant Change' has been proposed to strengthen the OM monitoring and evaluation activities, and 'Action Learning Days' can complement M&E activities by offering an extra space for reflection on issues not normally addressed. Finally, some have suggested that the fact that OM does not explicitly assess existing behaviour and relationships could



be a weakness, particularly in situations where there may be disagreement about these issues. To counter this, members have suggested performing an extended 'timeline' activity, or using TAI's.

For more discussion on implementing OM and using tools to complement the framework, see the following discussion summaries:

- OM and partnerships
- Bringing in Powerful BP's
- Tools to strengthen OM

2.3 OM and the Logical Framework Approach

Due to the prevalence of the LFA, it is important for OM users to have a good understanding of the differences between the two frameworks. Community members have discussed this issue, making the following points. OM and LFA are based on different perceptions of the nature of social change: LFA takes a "mechanistic" view focusing on the "ballistic" term 'impact' which implies a discrete, measurable, predictable and straightforward relationship between a programme and the change it wishes to make, whereas OM sees development as characterised by long-term, open problems, and recognises that social change is complex and requires change in many actors over a long period of time. Following from this, LFA assumes that the results development programmes aim for are fully within their control, whereas OM is based on an understanding that agencies can only influence and contribute to development outcomes. Related to this, unlike the LFA OM also accepts that there are limits to a programme's influence, so encourages a focus on those organisations with which you work directly.

Learning community members have found the need to highlight these differences when introducing OM in workshops, and when seeking approval to use OM for their programmes. In workshops, it can be particularly useful to do if the organisation has been using LFA beforehand, or if you have introduced OM concepts in relation to similar elements of the LFA. It can however sometimes be important not to be seen as advocating one framework over another, some members have found it useful to hold a group exercise towards the end of the workshops for participants to come up with differences between the two frameworks. When 'pitching' OM to donors, some community members have used the argument that OM is the solution to 'bridge LFA to the field': in light of LFA's well-documented problems for use 'on the ground', you can argue that while LFA gives donors what they need for their largely uninformed pre-project planning from a distance, OM gives those working at local level need a more flexible, practical approach allowing them to react to the realities of social change.

Where an organisation is already committed to a log frame, it is important to see how OM can be integrated into the current framework. One way of doing this is to use the outcome challenges, strategy maps etc to guide selection of the outputs and other components required in LFA, or to do this with selected objectives from a log frame. Another way is to introduce OM 'by stealth', using it for your own planning while reporting to donors etc using a log frame, or gradually implicitly including selected elements of the OM approach in programme reports without using explicit terminology.

For more on OM and LFA, see the following discussion summaries:

- OM and LFA
- Reflections on development paradigms
- OM in Cambodia
- Tools to strengthen OM



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2.4 Advocating for OM

When looking to introduce OM in your organisation, it is important to make the case for OM in a manner that resonates with those who have influence, as well as anticipating arguments against it, and being prepared to counter these criticisms. The learning community has given a space for members to share a number of arguments such as these. Justifications of Outcome Mapping have focused on the fact that it is based on a more realistic view of social change (for this see the sections 'OM and LFA' and 'Theoretical Issues'), balances accountability with reflection, learning and adaptation, and is likely to lead to more demonstrable good results. The participatory nature of OM and the fact that it allows communities to frame development goals 'in their own words' are likely to improve development interventions by ensuring that they are based on a sound understanding of the local context and a realistic view of the possible solutions. As mentioned above, OM is also considered particularly useful when working with partnerships, with powerful boundary partners, and in carrying out advocacy work.

One frequent objection to OM is that the process is too lengthy: to respond to this, community members have used various ways of shortening sessions (as discussed in the 'Advice for Workshops and Introducing OM' section), spread the workshop out over a number of sessions, or prepared a framework in advance to be modified as they go along. Another frequent reaction is to see OM as unappealing because, through its focus on boundary partners, it seems to put new limits on the influence that your organisation can have. To reply to this, it may be necessary to highlight that OM is more realistic in this way, properly accommodating the nature of social change, and allowing your organisation to focus its effort where it is likely to be most effective.

Community members have agreed that it is important to continually build a case for OM that will resonate with donors and powerful actors in international development. One way of doing this is to identify passages in these actors' own organisational practices that can be used to justify OM, and to amplify donor and government-led endorsements of the framework. It would be hugely beneficial for a case to be systematically built for the benefits that OM holds over other approaches, one method might be to run OM and LFA side-by-side to monitor the improvements that OM can offer even when evaluating according to LFA criteria.

For more on advocating OM, see the following discussion summaries:

- Strengthening the case for OM
- Common arguments for and against OM
- Ideology and models for development
- OM and partnerships
- Bringing in powerful Bps

2.5 Theoretical discussions

The learning community website has given members the opportunity to discuss issues they may not have a chance to address in their day-to-day work, posing questions of a more theoretical nature about OM and paradigms for development, and about the motivations behind various features of the OM framework. The 'attribution problem', the fact that in international development it is nearly impossible to prove the extent to which a development outcome has been caused by an individual agency or programme, has long been used to justify a focus on achieving predetermined outputs ahead of driving for real long-term change. Members felt that OM's focus on contribution was more



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honest, relevant and productive approach to development; since it is realistic to replace the notion of control over development outcomes with that of *influence*, it is appropriate to replace a focus on attribution with one of *contribution*.

Members also discussed the relationship between ideology and models for development. To properly describe and explain things we must inevitably make choices about which kinds of factors are relevant and which aren't, and a model is a useful way of systematising this. However, many have seen occasions where donors' perspectives are inappropriate, and the failures of their models to fit the local context have led to failed interventions. Members concurred that the most useful model to use in a context is likely to be one formed from the perspectives, viewpoints and experiences of those immersed in the situation where the intervention is to take place, i.e. the local level. This is a key challenge for development, it is extremely important to be sensitive to local needs, and to work with existing behaviour to foster change. Relating to this challenge, it was argued that OM offers marked advantages over other approaches due to allowing communities to frame change 'in their own words', and define the boundaries and objectives of their development projects. However, due to this it is very important that organisations should not unconsciously bias communities in setting out the elements of the OM framework, and you have to be ready to move to help another community if it becomes clear that your organisation cannot provide the kind of assistance that the community needs.

Relating to specific aspects of the OM framework, members discussed the overlapping nature of the concepts of "behaviour, relationships, activities and actions" in IDRC's definition of change, coming to the conclusion that it was meant to signpost a shift in the focus of development interventions rather than specify strict distinctions of types of change. It was also decided that progress markers need not be arranged 'expect, like, love to see', but simply needed to represent an arranged sequence of behavioural changes indicating a progressively deepening transformation.

For more on theory and paradigms, see the following discussion summaries:

- OM and the attribution issue
- Ideology and models for development
- Reflections on development paradigms
- OM definitions of change
- On being 'Western'

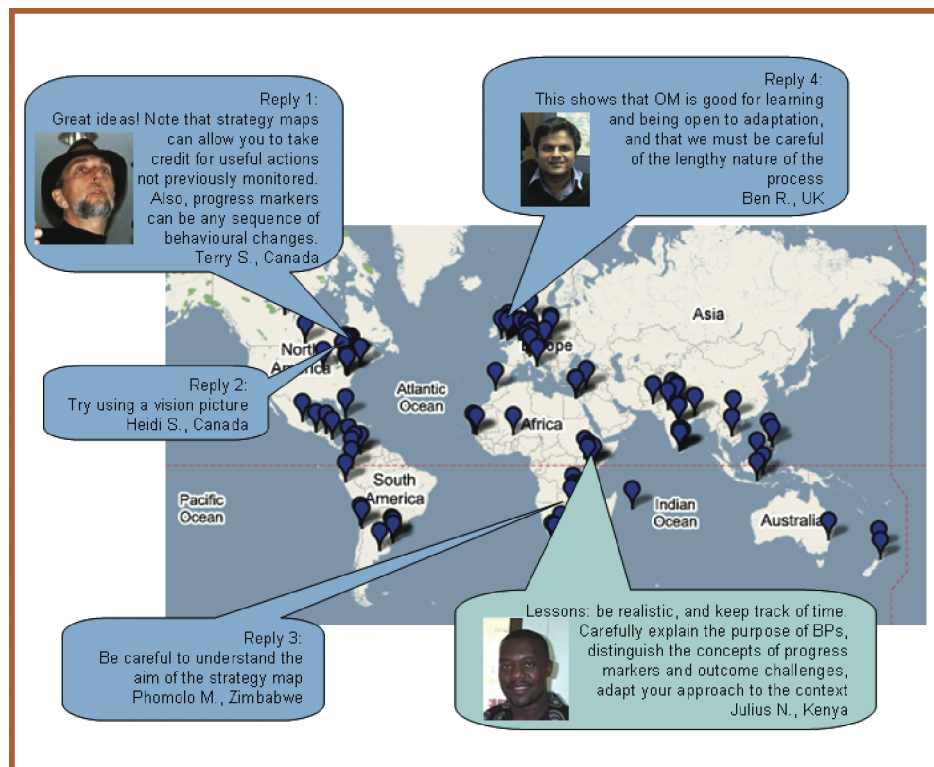


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3 Discussion Summaries

3.1 OM Lessons from Kenya, 31st January - 6th February 2006

Discussion on the OM Community Map:



Discussion Summary

Prepared by Harry Jones

19th December 2006

Link to discussion online:

http://www.dgroups.org/groups/idrc/OM/index.cfm?op=dsp_bydate&listname=OM&s=201&m=100&cat_id=13913&d=DESC

Original Emails

[Julius Nyangaga](#), Kenya

31st January 2006 -

Dear All,

I have been assigned (by my Supervisor and ILRI) to try implementing Outcome Mapping for an NGO (called SITE; get in touch if interested in the long version) and it was my first actual OM planning activity.



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Last week I led a shortened version of the OM workshop for the NGO and promised to share what came out of it. Thanks very much, Kaia, for the encouragement. I expected a rap!! Maybe you are being polite, but thanks for the leniency anyway. So I will try to be a model student from here on.

I am going to send the observations and lessons I am going through in different mails to the DGroup. Reasons:

1. To keep the message short
2. To encourage members to open and discuss on a subject they may have an interest in.

Thanks,
Julius Nyangaga, ILRI

Responses were received, with many thanks, from:

1. [Julius Nyangaga](#), Kenya (6 contributions)
2. [Terry Smutylo](#), Canada (4 contributions)
3. [Heidi Schaeffer](#), Canada
4. [Phomolo Maphosa](#), Zimbabwe
5. [Ben Ramalingan](#), UK

Summary of Responses:

1. First, [Julius](#) offered advice for when shortening the period of an OM workshop. Due to lack of funds, his workshop could only last one day, so it only set out to derive the vision, boundary partners, outcome challenges, progress markers and strategies, with the other elements to be discussed in later meetings by the core implementing team. Although it requires more than one day for a team to fully understand and adopt the OM methodology, the programme followed by Julius's team was realistic, and would be an effective strategy for anyone constrained by funds and time.
2. Secondly, Julius warned against spending too much time deriving the vision statement, which can often happen because it is the first group exercise. If this activity is in danger of over-running, you can ensure that things are completed in time by using the contributions received in the allotted time to formulate a vision statement to circulate after the workshop, or arrange to continue the discussion later. Also, some programme leaders do not immediately see the point of defining boundary partners where they have already identified crucial working partners. To address this, it is important to highlight that boundary partners are those whose behavioural change will indicate the achievement of the programme's vision. He suggested calling them 'impact partners'.
3. There can occasionally be confusion when deriving the outcome challenge and progress markers, so it is important to introduce and explain the two principles together, highlighting the differences between them. Julius remarked that the discussion of these elements often hit on problems about the qualitative and quantitative aspects of behavioural change, he asked exactly "what behavioural change will indicate consumers are drinking more milk?".
4. When deriving the strategy map, it is important to highlight that it will help the programme consider all that can be done to influence change in the identified boundary partner. There is often resistance to new activities defined by the strategy map if the project budget has already been set out, which may make it necessary to apply for more funding, although the



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map can help identify strategies which are not resource-heavy. Also, it may be worth bearing in mind that you must not get fixated on filling in every box on the strategy map, as the main point is for participants to understand how the programme will be aiming their actions at their many partners.

5. In reply to Julius's suggestion of the term 'impact partner', [Terry Smutylo](#) pointed out that OM is founded on the fact that the term 'impact' is misplaced due to the complexity of social change.
6. [Terry](#) applauded Julius's suggestion of explaining outcome challenges and progress markers together, and said that he would be experimenting with this and may attempt a kind of informal 'test' for participants to work together to identify sentences which belong in the vision statement, and ones which belong in the mission statement. He added that buying and drinking more milk are behavioural changes, but conceded that they may be difficult to measure.
7. [Terry](#) agreed with Julius that doing a strategy map after a project has received funding can help make sure they are doing all that they can to get results, but it can also be used to recognise, document and take credit for things that they do routinely, which may not have been previously seen as relevant to M&E.
8. [Heidi Schaeffer](#) adapted her OM workshops by using a vision picture rather than a statement. This was more accessible, served to motivate staff and was used in promotional material.
9. Phomolo Maphosa echoed Julius's thoughts on the strategy map. If the matrix is used dogmatically and participants become fixated on filling out every cell precisely it may restrict strategy development, so it is important to be flexible and not lose sight of the general aim behind completing the map.
10. [Ben](#) summarised the discussion so far in terms of forces for and against the utilisation of OM. Forces for are the focus on learning and participation, and the potential to innovate and build on the methodology. Factors which need to be overcome to implement OM are the lengthy nature of the process, the challenge of facilitating certain elements of OM, the crucial nature of timing of the OM process, and the flexibility to innovate too far.
11. [Julius](#) added that another danger of holding a short OM workshop is that it takes considerable time to contribute expected behavioural observations, rather than just generalisations of what is supposed to happen. He agreed with Ben's observation that there is a substantial challenge in facilitating the workshops, and said that he liked Heidi's suggestion of a vision picture. He suggested that it could be particularly useful with participants who may have difficulties with written text. Finally, he asked whether one must use 'expect, like, love to see' as specific steps or guiding headings, as there may be a series of steps between the initial stages and vision level of a project.
12. [Terry](#) replied that 'expect, like, love to see' are not strictly necessary to the concept of progress markers, and the important thing is to have arranged a set of observable behavioural changes that indicate a progressively deepening transformation. Having said that, naming different stages does create reference points and a focus for discussions.



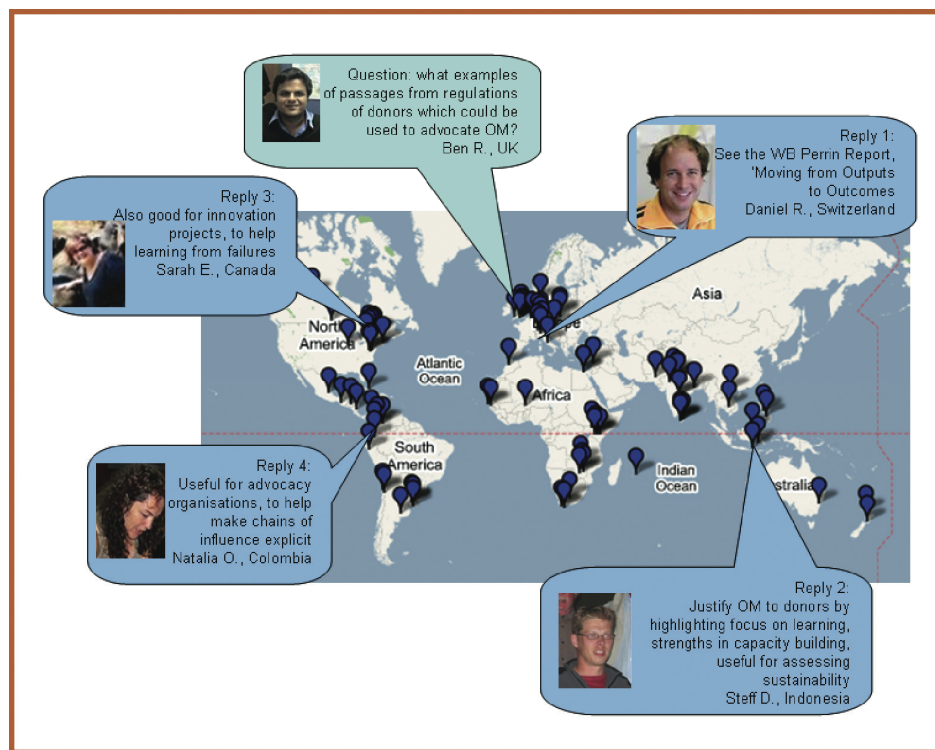
Concluding remarks and actions to take forward:

- Since there are frequently constraints on OM workshops, it may be necessary to shorten the process, and it is important to not let some sessions over-run to the detriment of others.
- It is important to take care when explaining certain elements: it may be necessary to highlight that boundary partners are specified for the monitoring and evaluation of your work, and it may be useful to outline progress markers and the outcome challenge together, highlighting the differences.
- It should also be noted that progress markers do not necessarily have to be categorised 'expect, like, love to see'; the key is that there is an arranged sequence of behavioural changes that indicate a progressively deepening transformation.
- The strategy map is useful not just to ensure that your programme is doing all it can to achieve its goals, but also allows you to take credit for the many useful activities which may have not been monitored previously.



3.2 Strengthening the case for using OM, 27th February – 3rd April 2006

Discussion on the OM Community Map:



Discussion Summary

Prepared by Harry Jones

2nd January 2007

Link to discussion online:

http://www.dgroups.org/groups/idrc/OM/index.cfm?op=dsp_showmsg&listname=OM&msgid=336315&cat_id=13913

Original Email

[Ben Ramalingam](#), UK

27th February 2006

Dear All,

I recently found the following quote in the USAID programmatic rules and best practices (what they call their "Automated Directives System").

"...In the development work that is the core of our programs, we almost never have total control over the results we seek to accomplish. Indeed, development results that would be within our control are not likely to represent sustainable development. Rather than limit ourselves to mundane, safe, but



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not useful results, our goal is to select objectives that reach high and inspire others but that are also within our manageable interests.

The concept of manageable interest recognizes that achievement of results requires joint action on the part of many other actors such as host country governments, institutions, other donors, civil society, and the private sector. When an objective is within our manageable interest, it means that we have reason to believe that our ability to influence, organize, and support others around commonly shared goals can lead to the achievement of desired results. The probability of success is high enough to warrant expending program and staff resources.

In such cases, the concept of accountability for results means that we expect our teams, field missions, and [head office] units to

- * Make intelligent, informed choices on what results to pursue
- * Manage proactively towards those results
- * Respond effectively to the inevitable changes in the development and policy environment that affect the feasibility of our selected results by modifying tactics or strategies
- * Provide transparency and objectivity when reporting problems and progress
- * Help the entire Agency learn from successes and failures

Accountability is achieved through meeting these requirements, rather than simply by achievement of agreed-upon (numerical) targets." From USAID ADS, Chapter 200

This concept of "manageable interest" seems to me to present a powerful case for the use of OM methodologies. What do others think?

Has anyone else come across anything similar in the formal rules and regulations of any agency?

If so, it would be great to share and collate them...

Responses were received, with many thanks, from:

6. [Daniel Roduner](#), Switzerland
7. [Ben Ramalingam](#), UK
8. [Steff Deprez](#), Indonesia
9. [Sarah Earl](#), Canada
10. [Natalia Ortiz](#), Colombia

Summary of Responses:

13. [Daniel Roduner](#) asked community members whether they had seen similar passages in regulations of other donor agencies, and shared a World Bank paper, "[The Perrin Report: Moving from Outputs to Outcomes, Practical Advice from Governments Around the World](#)", based on a World Bank round table involving officials from 6 developed and 6 developing countries.
14. [Ben](#) urged community members to share other donor-led justifications for OM, which could be collated into a convincing covering letter to send with the OM manual to donor working groups and committees.
15. [Steff Deprez](#) provided various justifications for OM aimed at donors. OM provides a framework-orientated approach, fostering learning and reflection on how change can be



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achieved rather than simply focusing on achieving specific results; OM can be useful to analyse the sustainability of existing programmes, as well as provide an excellent framework to negotiate a gradual 'move out' of support and staff; OM is a powerful tool to facilitate and strengthen partnerships between donors and local partners; OM is a good method for reviewing capacity development interventions.

16. [Sarah Earl](#) applauded Steff's contribution and added that OM is particularly appropriate for programmes focused on innovation, such as some research programmes: since many attempts to innovate will fail it is important to accept that there will not be a concrete output from every project, and have learning systems in place to ensure that efforts are not wasted.
17. [Natalia Ortiz](#) argued that OM is appropriate for advocacy and awareness-raising projects and programmes. OM helps these programmes make explicit the chains of influence which lead from their actions to the changes they hope to bring about, and encourages people to think about how to take advantage of the effects their campaigns will have on the general public, for example how to channel public reactions to bring about policy changes. This helps guard against seeing their campaigns as an end in themselves, and to articulate their effect as part of a long-term process of change.

Concluding remarks and actions to take forward:

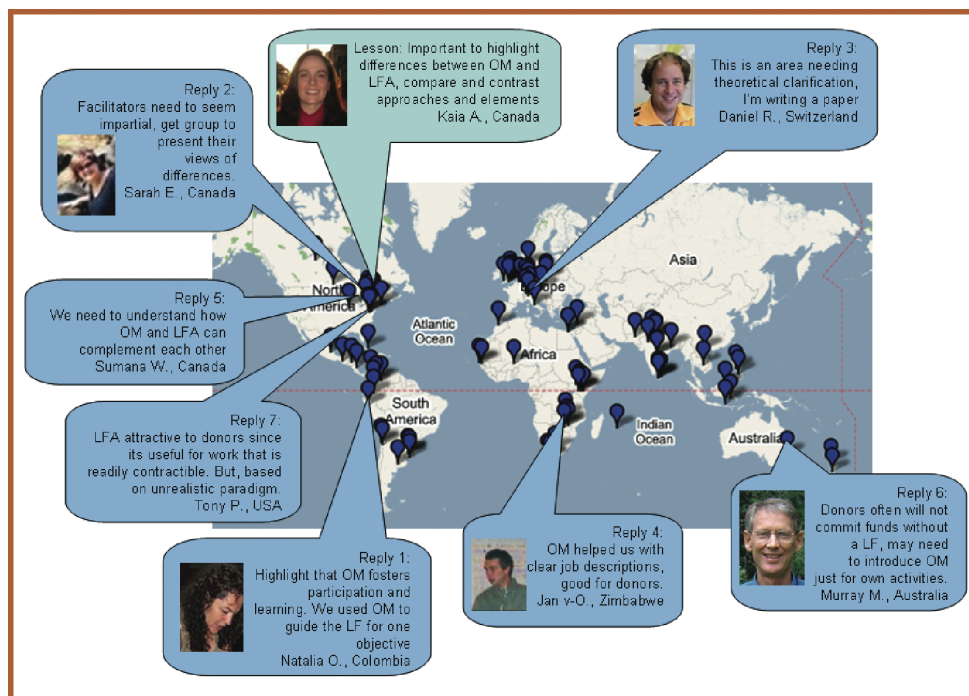
- It is crucial to build the case for OM, in a manner which will resonate with donors. The learning community is an ideal space to begin building this case.
- One way of recommending OM to donors is to identify passages in their own organisational practices which can be used to justify it. Sources from governments and international agencies will also be powerful tools.
- There are many important points to be made about the efficacy of the OM framework in general, and in particular for partnerships, capacity building, and advocacy.



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3.3 Outcome Mapping and Logical Framework Approaches, 20th March – 27th April 2006

Discussion on the OM Community Map:



Discussion Summary

Prepared by Harry Jones

2nd January 2007

Link to discussion online:

http://www.dgroups.org/groups/idrc/OM/index.cfm?op=dsp_showmsg&listname=OM&msgid=346473&cat_id=13913

Original Email

[Kaia Ambrose](#), Canada

20th March 2006

...

Ok, now for what Natalia and I did in the workshop in Ecuador re: OM-LFA, what we did was basically the following, in terms of acknowledging LF within PM&E systems (it wasn't an OM-LFA workshop, it was an OM training workshop, but we highlighted commonalities and differences between OM and LFA as requested by the client):

a) Present the underlying concepts and basic structures (most commonly used) of LF (which a lot of participants were not entirely familiar with - their particular projects used different combinations / interpretations of LF).



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b) Present CIAT's Institutional Learning and Change (ILAC) 'paradigm shifts' to highlight the different paradigms from which LF is born and from which OM is based on (this was a hit with the participants; I think you can find the document on the website, if not, remind me to send it to you).

c) Highlight where behavioural change takes place (in relation to the project and to the 'change in state'), using [Montague's Circles of Influence](#) (I find this resource useful, especially visually, for examining behavioural change. Again, I don't have it on me, but when I am back in Canada, I can send it to you / the group).

d) Work with participants throughout the workshop to identify at which points OM should and could (given time, resources, donor needs) be developed. For example, at the results level of their LF, some participants added on the 'outcome journals' for different 'boundary partners' in order to carefully look at behavioural change (using 'progress markers' as just that, and not as 'indicators') within their project. Other participants incorporated 'strategy maps' into their annual planning, for example.

e) We worked with the participants (in group work) throughout the workshop to highlight the importance of a monitoring plan, the balance between accountability (and to whom) and learning (for whom), and utilization-based evaluation. Our goal was not to say "Here's a new methodology that you will have to now do in addition to the M/E that your donor demands that you do", but instead bring the focus to project / organizational / boundary partner learning and see where OM can be worked in to existing structures, spaces, tools and commitments. Participants left with some action plans, with the enthusiasm to explore further the potential of OM.

Natalia, am I missing anything?

I might add that this is really our first stab at bringing (highlighting) this in a workshop - this was an experiment for us and a learning experience. We think it worked well FOR US (and we know that not everyone will be in agreement with what we did or how we approached it!), and we will work to refine it in the future.

I hope this helps - would like your thoughts (and experience) on this as well, Daniel!

Kaia

Responses were received, with many thanks, from:

11. [Natalia Ortiz](#), Colombia
12. [Sarah Earl](#), Canada (2 contributions)
13. [Daniel Roduner](#), Switzerland (2 contributions)
14. [Jan Van Ongevalle](#), Zimbabwe (2 contributions)
15. [Sumana Wijerathne](#), Canada
16. [Murray Millar](#), Australia
17. [Tony Pryor](#), USA

Summary of Responses:

18. [Natalia Ortiz](#) introduced herself, and outlined her experience in M & E and with OM. She added to Kaia's discussion of their OM workshop in Ecuador by pointing out that the projects they were working with were already using LFA as a planning method. Although the projects



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were chiefly aiming to produce behavioural change, the LFA objectives were largely outputs, and did not sufficiently express what social changes needed to come about. By emphasising how OM will foster learning within groups of boundary partners and that the changes are readily observable, they persuaded the participants to refine one of their LFA objectives to become an Outcome Challenge. Natalia explained that with the outcome challenge defined, the progress markers and strategies then followed and could be used to guide the selection of outputs etc for the LFA framework. This made it easier to negotiate the use of OM with the donors, although it was crucial to emphasise carefully the open nature of the problems represented in the outcome challenge, i.e. to acknowledge that although some specific outputs could be expected within the specified time frame, the overall social change they were looking to contribute to could not be guaranteed in this way.

19. [Sarah Earl](#) shared her experiences from an OM workshop in Germany. After the workshop had covered the elements of OM, Sarah got one of the participants who was particularly familiar with OM to make a presentation “what is RBM and the LFA?”, followed by participants forming small discussion groups which then presented their ideas in plenary. By getting the workshop participants to present the differences between the frameworks, facilitators avoid the problem of seeming to advocate one framework over another.
20. [Daniel Roduner](#) felt that although time constraints were the biggest obstacle to outlining the differences between OM and LFA in workshops, it was also an area that needed *theoretical* clarification. To this end, he is writing a working paper on this issue, and urged community members to share their experiences and volunteer for the testing phase of his project. In reply to Natalia’s experiences of introducing OM to an LFA-based project, he felt that the main problems faced in this situation are that boundary partners are not defined, and that strategies and activities are project-led, with no definition of what is required of partners. These factors can make it difficult to rephrase objectives as outcome-related goal.
21. [Jan Van Ongevalle](#) commented that differentiating between strategies and activities was a difficult task, and one which they were not concerned with in his organisation. This allowed the project co-ordinators to develop very clear job descriptions which helped persuade donors of the importance of various roles within the programme, but also led to the OM monitoring document being very long which made monitoring more difficult.
22. [Daniel](#) agreed that combining strategies and activities often gave project staff a clearer idea of what was required of them, but suggested that the two be used at different levels, so that it is clear which activities are linked to which strategies. He suggested that this issue be included in the next edition of the OM manual.
23. [Sumana Wijerathne](#) urged community members to share their experiences of how OM and LFA can be used to *complement* each other.
24. [Jan](#) said that in his OM workshops he allows participants to work on strategy maps without worrying too much about the difference between activities and strategies, writing their contributions on cards which were then stuck to the wall. By then grouping these cards, the activities gave an idea of the different strategies to be followed, giving participants a clear idea of what needed to be done as well as saving valuable workshop time.
25. [Murray Millar](#) shared his experience of attempting to use OM alongside a log frame in designing major project for a big donor. It was challenging to combine fully the contrasting



approaches, and resulted in the donor seeing the log frame as inadequate. The donors would not commit to a project without clearly achievable concrete outputs, which meant that Murray's team had to use OM at an underlying level. He argued that to make room for the use of OM, it is going to be necessary to clearly demonstrate that the approach produces better development outcomes.

26. [Tony Pryor](#) shared his views on the LFA, formed from his experience working at USAID. He said that LFA is attractive to donors as it covered the type of work that is readily 'contractible', whereas OM is seen as too fluid to attach budgets to. It is misleading in this way, however, since there is not a lot that any one group can control in development processes. He argued that the LFA's seeming rigour and linearity are its greatest weaknesses: since development is incremental and frequently non-linear, LFA's way of dealing with this in the 'assumptions' section is not satisfactory. He went on to describe Results Frameworks (RF), which are now used by USAID instead of LFA, and outline some of the key differences between RF and LF.
27. [Sarah Earl](#) thanked the community for their input, and said that she appreciated the advice on LFA reaching a 'contractible' scope of work. She suggested that this could mean that log frames are appropriate for I1 and E1 strategies in the OM strategy map, which may be an interesting clue about how to integrate OM and LFAs.

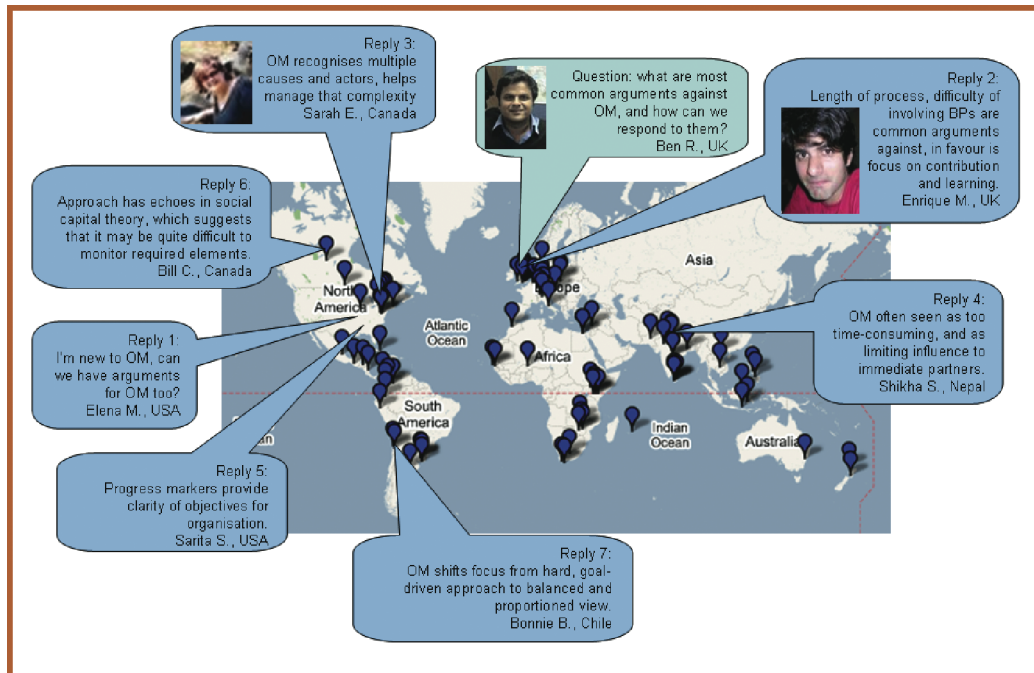
Concluding remarks and actions to take forward:

- Due to the prevalence of the LFA, it is often very useful to highlight the differences between OM and the LFA, and between the underlying logic they are based on. It can be important to avoid seeming to advocate one over another however.
- It is often the case that you are bringing OM to an organisation which is already running according to a log frame. It is important to work carefully to see how OM can be integrated with the current framework.
- One view is that LFA is relevant for 'contractable' work; this may mean that log frames are appropriate for I1 and E1 strategies.



3.4 The most common arguments for and against OM, 24th April – 9th May 2006

Discussion on the OM Community Map:



Discussion Summary

Prepared by Harry Jones

3rd January 2007

Link to discussion online:

http://www.dgroups.org/groups/idrc/OM/index.cfm?op=dsp_showmsg&listname=OM&msgid=363235&cat_id=13913

Original Email

[Ben Ramalingam](#), UK

24th April 2004

The OM knowledge exchange has already generated some great ideas for discussions.

The very first contribution was from Beatrice, who wanted to identify the "10 most common arguments AGAINST using OM encountered by participants on the list". I thought this was a great idea. I suggest we brainstorm as many arguments [and solutions, where appropriate]

Argument: The OM process is too long and involves too many different stages

My solutions have been to



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(1) Spread the OM process over a number of sessions i.e. one OM module per team meeting. This has the obvious cost in terms of focus and timelines, but

(2) Use specific OM modules as the opportunity arises, and creatively fit these into other methods i.e. using boundary partners and outcome challenges in social network analysis, which meant I started to use SNA as an action research process

(3) apply OM "by stealth" [i.e. without reference to the broader process]

Any comments or questions on the above?

Anyone got another argument?

Responses were received, with many thanks, from:

- 18. [Elena Marcelino](#), USA
- 19. [Enrique Mendizabal](#), UK
- 20. [Sarah Earl](#), Canada (3 contributions)
- 21. [Shikha Shrestha](#), Nepal
- 22. [Sarita Sharma](#), USA
- 23. [Ben Ramalingam](#), UK
- 24. [Bill Cowie](#), Canada (2 contributions)
- 25. [Bonnie Banks](#), Chile

Summary of Responses:

- 28. [Elena Marcelino](#) introduced herself and explained that she is relatively new to OM. She asked for members to provide good arguments *for* using OM as well as those against, so she has a good idea of the pros and cons.
- 29. [Enrique Mendizabal](#) agreed with Ben that the length of the OM process is a significant argument against OM, and offered 4 more: OM is founded on a vision that is too optimistic; it can be difficult (or impossible) to involve boundary partners in the process; it is yet another tool to be added to log frames, etc; implementing OM requires dealing with a large amount of information. Enrique also offered 4 arguments for OM: focusing on contribution rather than attribution is more honest; it is likely to lead to more demonstrable good results for the project; the focus on learning and adaptation as well as evaluation sits more comfortably with many; OM is flexible and works alongside other tools.
- 30. [Sarah Earl](#) listed some justifications for OM she often uses: OM helps articulate the contributions of your area of development to social transformation in general; OM recognises contributions of multiple actors and factors to social change; OM manages complexity and the ongoing nature of change; OM supports innovation by encouraging learning and improvement; OM promotes democratic principles and relationships.
- 31. [Shikha Shrestha](#) has also encountered the objection that OM is too time-consuming. To respond to this, she undertook some of the less important stages of the process herself, carrying out only the high priority stages with the whole team. She suggested that it may



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have been preferable to carry out the whole process herself to present to her team for discussion. A second argument against OM that Shikha came across was that it is an inappropriate framework for intermediary organisations; they have little control over the behavioural changes of the key boundary partners because they do not implement programmes.

32. [Sarah Earl](#) said that Shikha had hit on the fundamental concept that nobody 'controls' changing someone else's behaviour. She also pointed out that it was incorrect to suppose that one needed to be implementing programmes in the community to use OM, because boundary partners are nested and you assess your influence on whichever organisations you are working with directly. This is different from other evaluation methods which assume that influence has no boundaries; she remarked that while some see this as an appealing facet of OM since it is more realistic, others can react by feeling threatened, since it seems to imply that they are less influential than they supposed.
33. [Sarita Sharma](#) described her experiences of introducing OM without explicit reference to the framework. The exercise of developing a vision statement and progress markers went well, because the process was participatory and allowed room for reflection on her team's work and goals. The progress markers were particularly appreciated, Sarita's team sees them as providing a very clear targets to aim for, and she hopes to introduce the concept of boundary partners in the coming months.
34. [Ben](#) shared a paper by Terry Smutylo, '[Crouching Impact, Hidden Attribution](#)', which he felt was a valuable resource particularly for newcomers, and a song by Terry called '[The Downstream Impact Blues](#)'.
35. [Bill Cowie](#) said that he saw similarities in the OM approach with social capital theory. In social capital theory, people and institutions are embedded in relationships built on trust, networks and norms, with bridging and binding capital connecting them. From this perspective, OM would seem to be plotting the social capital from the perspective of a given unit. Bill argued that identifying social capital (by the explicit and tacit knowledge it contains) can be a difficult task, so OM will face a tough research and evaluation challenge in setting out to assess the changes in social capital due to a programme's intervention.
36. [Sarah](#) thanked Bill for his contribution, and said that it was very interesting to think about the concept of social capital as it relates to the knowledge embedded in the relationships. She asked Bill to suggest some further reading on the topic.
37. [Bill](#) referred Sarah to 3 papers on social capital ("Social Capital: Implications for Development Theory, Research and Policy", "Leveraging Social Capital in Organisations" and "Social Capital in the Creation of Human Capital"), and 2 case studies ("Trust, Networks and Norms: The Creation of Social Capital in Agricultural Economies in Ghana", and "Engendering Social Capital: Women Workers in Rural-Urban Networks in Indonesia's Crisis").
38. [Bonnie Banks](#) suggested that, in line with Terry's song, perhaps justification for OM could be found in poetry. She offered a quote from the book *Resistance* by Barry Lopez, which criticises the "success-mongering bull terriers in business, in government, in religion" who assert that people are essentially "goal-driven animals", suggesting that instead people look for "proportion", "balance" and "beauty" in life.



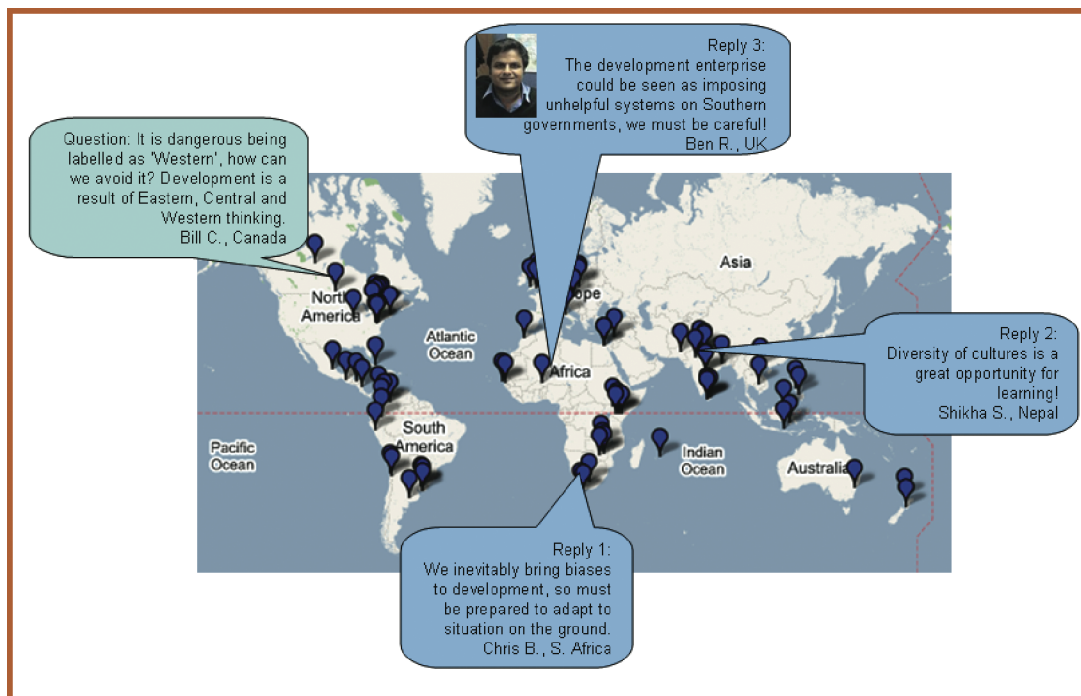
Concluding remarks and actions to take forward:

- When looking to introduce OM in your organisation it is important both to make the case for OM and to anticipate arguments against it, and how to counter them.
- One frequent objection is the time that the process takes: to respond to this, you could spread the process over a number of sessions, use specific modules as the opportunity arises, apply it 'by stealth', or you could prepare a framework in advance and then discuss it in a shorter workshop.
- Another frequent reaction is to see OM as unappealing because it seems to put new limits on the influence an organisation can have. To reply to this, it may be necessary to highlight that OM is more realistic in this way, properly accommodating the nature of social change.



3.5 On Being 'Western', 5th – 12th May 2006

Discussion on the OM Community Map:



Discussion Summary

Prepared by Harry Jones

3rd January 2007

Link to discussion online:

http://www.dgroups.org/groups/idrc/OM/index.cfm?op=dsp_showmsg&listname=OM&msgid=369097&cat_id=13913

Original Email

[Bill Cowie](#), Canada

5th May 2006

Hi all

I was wondering, given the conversation below, if it is not time for us to try to introduce and work with some of the ideas that Amartya Sen has tried to articulate recently in his book "Identity and Violence" (he was also in Ottawa recently talking to this sponsored by the IDRC).

I want to focus (as he does) on the notion - and label - that there is something called 'Western' thinking. As he points out we are not here today as a product of Western thinking but of global thinking. The modern industrial and technological order is a product of Eastern, Western and Middle East thinking - they have all contributed in real and tangible ways. To label something 'Western' he argues becomes the stick that reactionaries use to prevent their own populations from getting ahead



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- in the name of fighting 'Western' dominance. Instead of Western can we use another term - 'current best practices' - "recent thinking on organizational behaviour". I believe it is really important to take the ideological posturing (a residual effect of the Cold War?) out of this kind of conversation.

Thoughts?

Responses were received, with many thanks, from:

- 26. [Chris Burman](#), S. Africa (2 contributions)
- 27. [Shikha Shrestha](#), Nepal
- 28. [Bill Cowie](#), Canada (2 contributions)
- 29. [Ben Ramalingam](#), UK (2 contributions)

Summary of Responses:

- 39. [Chris Burman](#) feels that we do all bring certain biases to the 'development interface', which inevitably influence what emerges from interventions. However, rather than trying to take all ideology out of the enterprise, which may or may not be possible, the important task is to become aware of the values underpinning our approach, examine where these values might lead us, and assess whether these are desirable goals. He added that while development today has surely been influenced by multiple cross-cultural influences, there is a tendency for the 'Western' way of thinking to be promoted ahead of local ways. For example where Chris works in South Africa there is a "gap between the relevance of Western thinking and African reality which hinders development interventions". However, as he said, these cultural biases are unavoidable, and the important thing is to assess where the ideology behind development may be taking us, rather than where it has come from.
- 40. [Shikha Shrestha](#) explained that in her organisation, the philosophy is that 'diversity is beauty'. Although there are inevitably some difficulties with working with people who adhere to different cultural norms, Shikha feels that this presents a great opportunity to learn from each other.
- 41. [Bill Cowie](#) agreed with Chris that it is impossible to separate values and biases from development, but that these 'ideological' positions can simply be something like "we are concerned about people ahead of making money" or "these people need help and we know how to help them". Bill said that his main point is that it was simply misrepresentation to label development as 'Western', since it has surely been influenced by East, Central and West. This is particularly important to point out because the term 'Western' can "too often become the refuge of the fascist and anti-reformation theocrats".
- 42. [Chris](#) agreed strongly with Bill's latter point, and indicated that this is why he feels that education is so important. In Africa the term 'imperialism' is linked to anything 'Western', and is used by governments as a convenient smokescreen that leads people to blame outside forces for their situation, rather than critically analysing the state of their own lives and within their country.
- 43. [Ben Ramalingam](#) shared a story written by a colleague of his at the ODI, Andrew Rogerson. The story describes the troubles facing a person inheriting a house in need of repair, an



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allegory for the often contradictory and unhelpful nature of development assistance and aid architecture for developing countries.

44. [Bill Cowie](#) said that Ben's story was similar to issues raised in Michael Rosberg's book "Power of Greed". This describes a kind of 'dynamic stasis' in which huge efforts to bring about social change are futile because the relationships in the system are built to preclude change.
45. [Ben](#) asked community members to offer any 'real world' or OM perspectives to the debate.

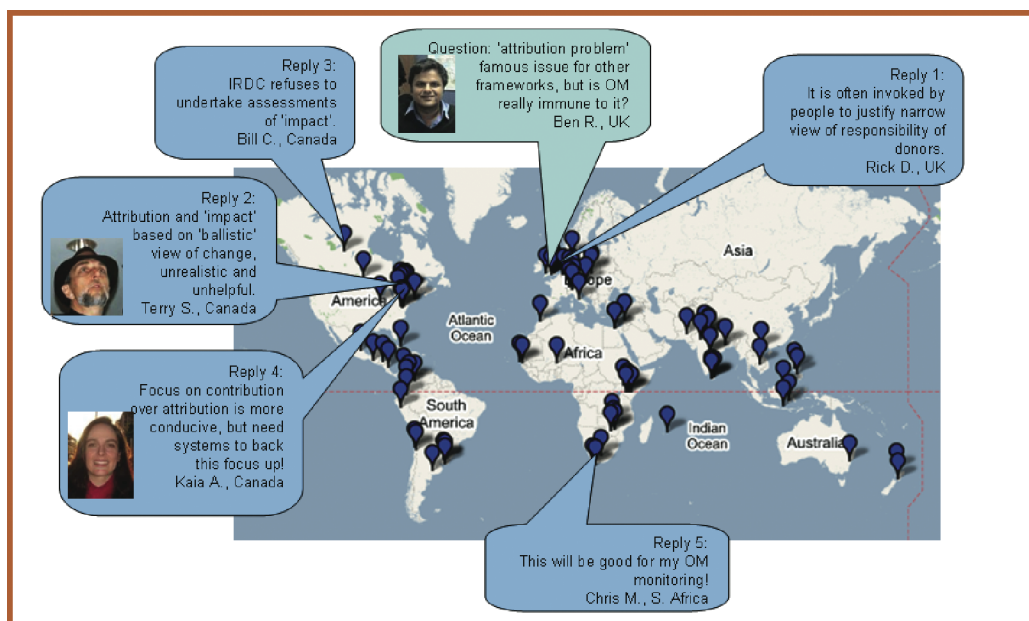
Concluding remarks and actions to take forward:

- It can sometimes be important to avoid the label of being 'Western': some governments politicise development interventions in this way, in order to divert attention from their own failings.
- It is very easy for organisations to bring certain cultural biases to their development work. Although it may not be possible to banish all values or ideology from one's approach, is important to recognise them, and to ensure that your approach is properly adapted to the context in which it is being applied.
- For more on this, see the '[Ideology and models for development](#)' discussion summary.



3.6 Does OM simply sidestep the attribution issue? 24th May - 5th June 2006

Discussion on the OM Community Map:



Discussion Summary

Prepared by Harry Jones

4th January 2007

Link to discussion online:

http://www.dgroups.org/groups/idrc/OM/index.cfm?op=dsp_showmsg&listname=OM&msgid=378759&cat_id=13913

Original Email

[Ben Ramalingam](#), UK

24th May 2006

Dear All,

Last week, we had some interesting contributions on the list, covering spheres of influence and how to assess them, the role of action research in OM, and an interesting story of how OM might have helped a community driven project in Indonesia, which led to an open invitation for OM-ers to visit Bakti and possibly develop a case study. We have also had some useful ideas for a slogan for the community to go on the front page of the imminent dedicated website, which will be available for polling shortly.

This week, I wanted to start a discussion that was inspired by the contributions of Petra and Agnieszka, and a conversation I had last week with a colleague about MDGs. The latter are almost infamous for their neglect of the attribution issue (i.e. the fact that in an international development, it



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is impossible to prove the extent to which a development outcome has been caused by an individual development agency). I suggested that an OM approach could be one way off addressing this, and mentioned the Paris declaration in this light. I was challenged by the response.

My colleague argued that OM didn't actually directly address the attribution issue, but instead sidestepped it by relocating the issue at the interface between a development program and its immediate stakeholders (or boundary partners). He also suggested that, in fact, the OM methodology moved from the progress markers to strategy maps to organisational practices without really getting to grips with HOW programme activities might contribute to behaviour change. In particular, he suggested that because there was no contextual analysis of the forces for and against change, you could go through an ideal OM process, yet end up with activities that are just as "top down" as those designed via a log frame.

In order to get a better feel for this issue, I would like to invite you all to share your views or experiences on the attribution issue, and how you have practically addressed this in your previous or ongoing work (whether through OM or using other tools or methods). What are some of the mechanisms and tools have you used? And – based on your experience – do you think my colleague is right: does OM simply sidestep the attribution issue?

Best wishes

Responses were received, with many thanks, from:

- 30. [Rick Davies](#), UK
- 31. [Terry Smutylo](#), Canada
- 32. [William Cowie](#), Canada
- 33. [Ben Ramalingam](#), UK
- 34. [Kaia Ambrose](#), Canada
- 35. [Chris Morris](#), S. Africa

Summary of Responses:

- 46. [Rick Davies](#) commented on the "ritualistic references" to the attribution problem, it is often invoked by those who think that development agencies' responsibility stops at the output level. To move beyond this narrow viewpoint it is necessary to "identify and analyse the significance of other sources of influence in addition to the project intervention". Rick argued that this does not mean that impact must be proved or quantified, but it is possible to start prioritising different influences by comparing different outcomes within a project location and the influences on the outcomes. He suggested that a "more deliberate, systematic and open approach to the analysis of influence" is a means of addressing the attribution problem.
- 47. [Terry Smutylo](#) described impact as a "ballistic term", based on a simple linear relationship between cause and effect. He argued that change does not occur in this way in the context of development, and hence the use of the term 'impact' and the related models of change leads to a "false sense of development reality". He argued that change usually comes about through the interaction of many factors. To get close to assessing attribution in social change we should pose 4 questions: a) did the cause happen first?; b) is there a logical connection?; c) what do knowledgeable persons say?; d) are there alternative explanations for change?.



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48. [William Cowie](#) pointed out that IRDC refuses to undertake assessments of impact, saying that no attribution for something long term and due to a multitude of influences can lend itself to attribution based on a specific intervention.
49. [Ben](#) said that he had recently closely observed one major agency's approach to this problem. On one hand, it seems to accept that it can "only contribute" to development "outcomes", demonstrated by its working through partnerships. However, it undertakes periodic evaluations of socio-economic changes in a country to attempt to demonstrate the positive changes it is causing at a macro level.
50. [Kaia Ambrose](#) offered her experiences with OM in a project in Ecuador. They set out with a good understanding of OM and support from IRDC, with an intention that their M & E should focus on properly examining at the change taking place, rather than simply trying to lay claim to it. Her team found OM participatory and engaging, and they felt that they were able to honestly "tell the story of what had happened" to IRDC, which was very beneficial to the project. Kaia concluded by arguing that whether we focus on contribution or attribution is irrelevant if there aren't clear and sensible processes that go with that focus, but overall she found it much more conducive to focus on contribution.
51. [Chris Morris](#) thanked Kaia for her contribution and indicated that it would help with his OM reporting.

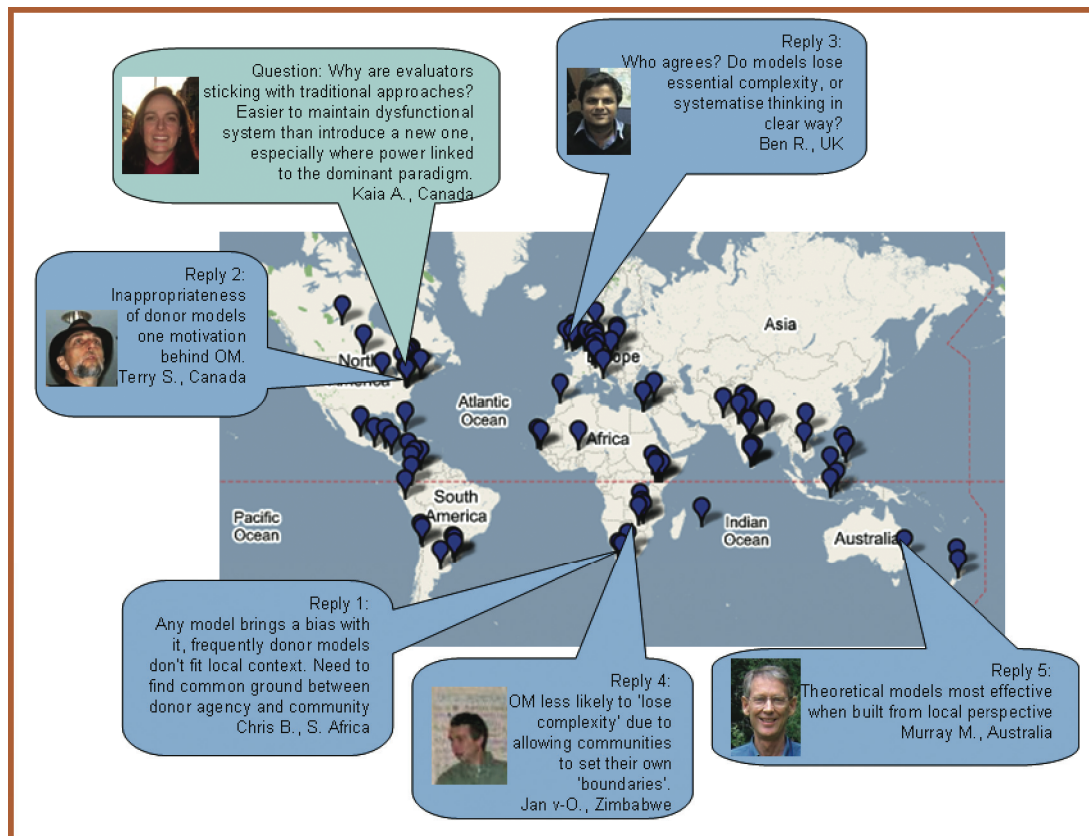
Concluding remarks and actions to take forward:

- The 'attribution problem' can often be used to justify a focus on 'outputs' ahead of real long-term change.
- Insofar as it is important to assess the causes of developmental results, this can be partially achieved through a "systematic, open analysis of influence".
- However, there are strong reasons for supposing that focusing on contribution is a more honest, relevant and productive approach to development.



3.7 Ideology and models for development, 29th – 31st May 2006

Discussion on the OM Community Map:



Discussion Summary

Prepared by Harry Jones

3rd January 2007

Link to discussion online:

http://www.dgroups.org/groups/idrc/OM/index.cfm?op=dsp_showmsg&listname=OM&msgid=381307&cat_id=13913

Original Email

[Kaia Ambrose](#), Canada

29th May 2006

I also thought the below message (from another list) was an interesting addition to our current discussion.

----- Forwarded Message -----

From: leannehankey <leanneblack@cox.net>

To: Theory-Based_Evaluation@yahooogroups.com



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Sent: Monday, May 29, 2006 11:48:30 AM

Subject: [Theory-Based_Evaluation] Why evaluators are largely sticking with conventional approaches

Hi,

I'm new to this list having stumbled across it on a net search. I am interested in the evaluation of development interventions using complex systems thinking. Referring to the last entry, I think a couple of factors that contribute to the reluctance of evaluators in using non linear approaches (in the arena of development evaluation anyway) are:

(1) If you look at a lot of evaluation contracts, their terms of reference (TORs) leave little room to exercise innovation. I have encountered many evaluators/consultants in a stressed out state, rushing around trying to pull together evaluation reports on multistakeholder programs in an absurdly short space of time. Little wonder evaluators stick with what they know. As long as the aid and development industry seems more intent on output than reflective/reflexive learning, I think most people within it will stick with what is fast, 'cheap' and convenient, even if they are plagued with the frustrations of doing so. Improvement entails not only change in the way evaluations are done, but systems change that encourages improvement and innovation. However, systems change is not easy. As a psychologist once said: "It's a lot 'easier' to maintain a dysfunctional system that produce a new one"! This leads me to my next point:

(2) From a 'critical' perspective, I think one reason (among many) why systems change is difficult is that people's careers are built on the systems that they know. The systems they know are part of their professional identity and as the old saying goes, 'If the shoe fits, wear it!' When careers, organisational success and funding are tied to dominant paradigms, resistance to change will come from many levels.

As much as we'd like to, we can't get away from issues of power and identity when we're trying to affect change. So even if we can translate innovative ideas into a language that bureaucrats and practitioners can understand, it doesn't guarantee acceptance; for change not only challenges the way things are done but also the assumptions on which they are done.

Being influenced by the writings of Michael Foucault, I think that instead of focusing exclusively on improvements in evaluation approaches, we also need to understand the formative elements of systems - in specific contexts - that enable and/or hinder improvement and innovation.

Leanne Black

(working on PhD research titled 'Assessing the Relationship between Capacity Building and Poverty Reduction')

Responses were received, with many thanks, from:

- 36. [Chris Burman](#), S. Africa (4 contributions)
- 37. [Terry Smutylo](#), Canada (2 contributions)
- 38. [Ben Ramalingam](#), UK
- 39. [Jan Van Ongevalle](#), Zimbabwe
- 40. [Murray E. Millar](#), Australia



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Summary of Responses:

52. [Chris](#) argued that systems thinking is still “an expert-designed *model* of the world”; he questioned why we need such models for evaluation when we can simply “directly investigate empirical reality”.
53. [Terry](#) explained that since ‘empirical reality’ is impenetrably complex, we necessarily must make choices about which ‘bits’ to look at: a model is a way of selecting and organising certain aspects of ‘empirical reality’ under the assumption that these selected types of factors are the important ones when looking at a particular phenomena.
54. [Chris](#) replied that many models in development are donor-driven and don’t fit the local context, for example he has found this in working with poor rural communities in South Africa.
55. [Terry](#) agreed that many donor-driven models are inappropriate to local contexts, and explained that this is one of the reasons why he developed Outcome Mapping. OM focuses on “the players and their partners within a specified boundary or context...staying as close as possible to how they operate in it”.
56. [Chris](#) clarified that he is not against models per se, but rather he is urging that we use them with caution, bearing in mind that they represent particular viewpoints, and that there may be many different views of the ‘same’ reality.
57. [Ben](#) urged community members to get involved in this interesting debate, he asked whether they felt that the application of ‘models’ leads to a loss of complexity, or whether they are simply making explicit the fact that we inevitably have to choose the ‘relevant’ aspects of reality to examine, and therefore help us focus our assessments of it.
58. [Chris](#) elaborated on his point. Models are based on a certain perspective of the world, and this perspective inevitably leads to a bias towards certain means or ends in development. However, clearly the local people who are the target of development interventions are likely to have different perspectives, which would be likely to lead to different views of what needs to be carried out by interventions. Chris believes that the key is to look for common language and common ground between the two perspectives to build sustainable results upon.
59. The discussion reminded [Jan Van Ongevalle](#) of a critique of the systems thinking approach. Since systems thinking is a model, it entails studying certain features of situations and ignoring others. However, this ignores the complexity of ‘reality’, which systems thinking supposedly set out to address in the first place. Jan believes that Outcome Mapping is more sensitive to this critique, since as it encourages considerable reflection and learning, it allows frequent analysis of which are the most appropriate ‘boundaries’ to draw around a programmes work and therefore what to assess and evaluate. In contrast, the LFA does very little to encourage reflection and learning.
60. [Murray Millar](#) argued that theory formulation is most useful if the model grows out of the context and experiences where the activity is taking place and is formed by those who are part of the experience. In this way, the crucial aspects of the complex situation faced in a



particular context will be considered in deciding how to remedy problems in that context.

Concluding remarks and actions to take forward:

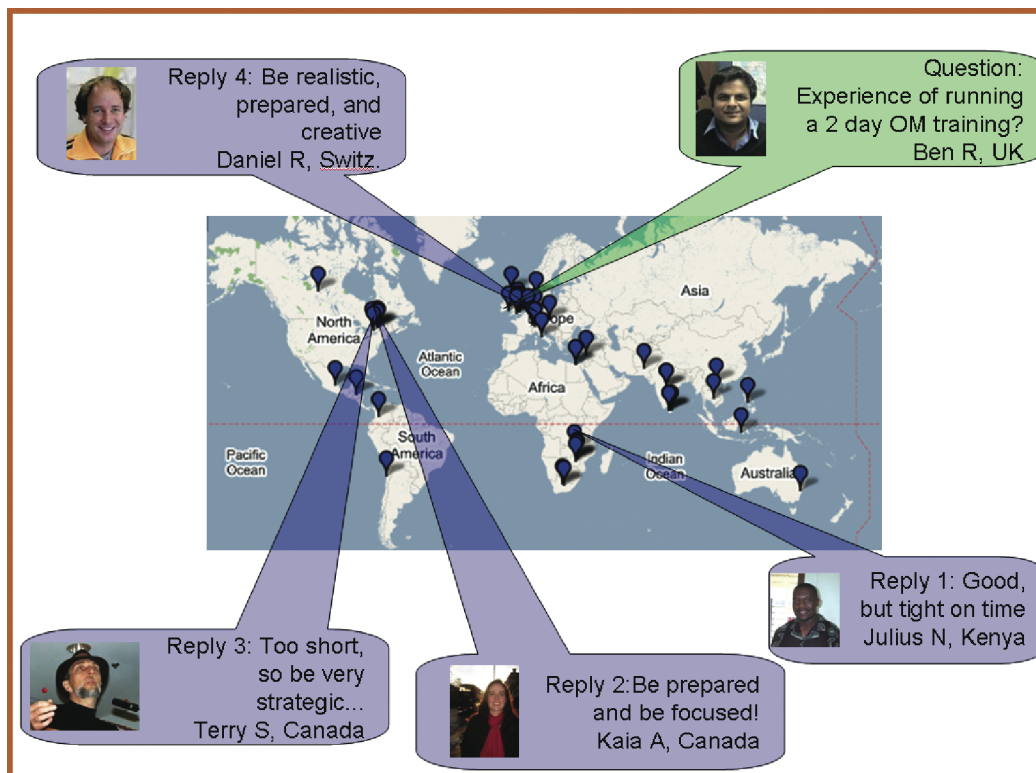
- To properly describe and explain the world we inevitably must make choices about which kinds of factors are relevant and which aren't, and a model is a useful way of systematising this perspective on development.
- Many donors' perspectives do not fit the local context, which frequently leads to failed interventions. The most useful model to use in any context is likely to be one formed from the perspective, viewpoints and experiences of those immersed in the situation where the intervention is to take place.
- OM is more sensitive to this critique by allowing communities to ensure that development goals are put in their own language, and by allowing organisations to reflect and adjust the boundaries and framework which they are using for their programme.



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3.8 Calling OM Trainers, 2nd – 6th July 2006

Discussion on the OM Community Map:



Discussion Summary: Calling OM Trainers

Prepared by Ben Ramalingam

6th July 2006

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

Original Email

[Ben Ramalingam, UK](#)

2nd 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 platform as a key resource to continue discussions after the event, and to strengthen OM-related networking across the UK.



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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.

Responses were received, with many thanks, from:

- 41. [Julius Nyangaga, Kenya](#)
- 42. [Kaia Ambrose, Canada](#)
- 43. [Terry Smutylo, Canada](#)
- 44. [Daniel Roduner \(two responses\)](#)

Summary of Responses:

61. 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 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."*

62. [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".*



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- 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 Organisational 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
63. Terry Smutylo, 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 workshop²

STRATEGY	CAUSAL	PERSUASIVE	SUPPORTIVE
STRATEGIES AND ACTIVITIES AIMED AT A SPECIFIC INDIVIDUAL OR GROUP	I1: Require that attendance at the two day OM workshop be either preceded by, or followed by, some facilitated 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.

64. 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

² 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>



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 strengths / 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.

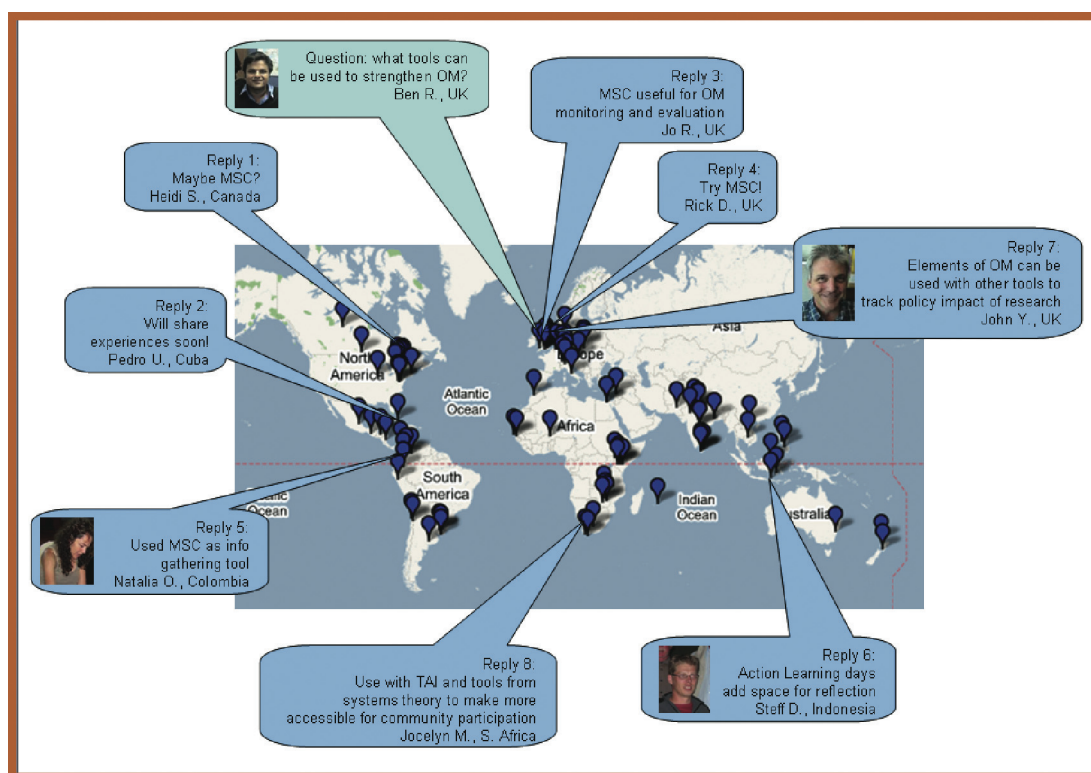
Concluding remarks and actions to take forward:

- Fitting an OM workshop into 2 days is difficult, and it is important to clarify realistically what participants want out of the session. While it may be possible to obtain a decent understanding of OM, possibly for the purpose of assessing whether it is suitable or feasible for your organisation, it may not be possible to take participants with no initial knowledge of OM to a stage where they are ready to apply it as an M & E framework for their own project.
- Preparation is very important. It is advisable to profile the workshop participants and carefully tailor your approach to them, and it may be useful to draft elements of the framework (e.g. vision and mission statements) to be circulated in advance for discussion and revision in the workshop.
- When explaining OM, it may be effective to concentrate on boundary partners, as this exemplifies the "essence of OM" and the shift in approach that OM embodies.



3.9 Tools to strengthen Outcome Mapping, 7th – 24th July 2006

Discussion on the OM Community Map:



Discussion Summary: Tools to strengthen Outcome Mapping

Prepared by [Harry Jones](#)

1st December 2006

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=42> and <http://www.outcomemapping.ca/forum/viewtopic.php?t=47>

Original Email

[Ben Ramalingam, UK](#)

7th July 2006

Dear All,

First of all, welcome to all members who have joined in the last two weeks - Rita, Goele, Ziad, Jocelyn, Mark, Nicholas and Vitor. It's good to have you on board. I do encourage you, and existing members, to add more details about yourself to your profile page, like your photograph, your map location, and your interest in Outcome Mapping. It helps us know each other better, and it brings a great energy to the community!



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Next, I wanted to share with you all a very recent publication of mine, entitled Tools for Knowledge and Learning: A guide for development and humanitarian organisations (You can view it in the community Resource Library on <http://www.outcomemapping.ca/resource/resource.php?id=89> , and if you want to, you can rate it and add comments too!).

Working on this toolkit got me thinking, what tools can be used to supplement and support OM? I am sure we have a wealth of experience in the community of such tools.

For example, one such tool which my team used in the past is Force Field Analysis (tool 9 in the handbook). This is the classic change management tool developed by Kurt Lewin, and we used it in a workshop last year with the International Forum for Rural Transport and Development - Latin America. We applied it after developing the Progress Markers and Strategy Maps, and used it as a means to brainstorm the forces for and against the changes we wanted to see happen.

It worked very well and really energised and focused the workshop group to develop their Organisational Practices. It also helped to analyse supports and constraints to change - which is not looked at in the OM framework. (Here is a link to more info on this application - most of it is in Spanish: http://www.odi.org.uk/Rapid/Events/OM_Cuba/Index.html)

Would those of you who have used such additional tools in your OM work post a message and tell us a bit about the tool, what point in the OM process you used it, what needs were met, and what the results were? I think we could learn a lot!

Responses were received, with many thanks, from:

- 45. [Ben Ramalingam](#), UK (2 contributions)
- 46. [Heidi Schaeffer](#), Canada
- 47. [Pedro Urra](#), Cuba
- 48. [Rick Davies](#), UK
- 49. [Natalia Ortiz](#), Colombia
- 50. [Steff Deprez](#), Indonesia
- 51. [John Young](#), UK
- 52. [Jocelyn Muller](#), South Africa

Summary of Responses:

- 65. [Ben Ramalingam](#) reminded members that if enough contributions were received on this topic, they could be used to develop a community output called “Outcome Mapping: Supporting Tools, and When to Use them”.
- 66. [Heidi Schaeffer](#) suggested that the ‘Most Significant Change’ (MSC) Technique may be of interest. She explained that she was still learning about this tool, but that she intended to share stories about how MSC connects with OM in the near future.
- 67. [Pedro Urra](#) used the tool in Infomed for over a year ago, and is currently applying it in the Latin American School of Medicine. He promised to share his experiences with the community, and mentioned that he has been making a presentation in Spanish of the “Tools for Knowledge and Learning” toolkit.



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68. Ben thanked Pedro and Heidi for their responses, and suggested Pedro added his Spanish presentation on the tools framework to the resource library. He outlined the suggestions of [Jo Rowlands](#) for how MSC could prove useful at the monitoring and evaluation area of Outcome Mapping. The stories of change from constituents could be used to track changes as they happen in a systematic way, after having been through the intentional design phase. MSC also enables an analysis of the gathered information with reference to the outcome challenges and progress markers.
69. [Rick Davies](#) directed members to the MSC Guide, the most up-to-date documentation on the technique <http://www.mande.co.uk/docs/MSCGuide.htm>.
70. [Natalia Ortiz](#) told the group that CIAT had been planning to use the MSC technique as an information gathering tool to fill the diaries on a multi-site project in Central America, by capturing the most significant changes of the countries that were involved in a learning network. She promised to share any findings from her enquiries into the results of this.
71. In Zimbabwe, [Steff Deprez](#) of St2eep has experience of complementing the Outcome Mapping process with what St2eep have been calling Action Learning days (AL-days), which are based similar ideas to Action Learning Sets and Cooperative Inquiry.
- AL-days involve the project implementing team, and are scheduled for the day after, and once in between their 4-monthly OM monitoring meetings.
 - AL-days provide time for members of the implementing team to share and reflect on issues which are not normally discussed in formal meetings, with a focus on the inter-personal level.
 - Steff explained that, although AL-days are not entirely straightforward to implement, they have already brought up some interesting challenges and identified some collective issues.
 - Issues identified in the OM monitoring meetings can be 'banked' to take up again during the AL-days.
72. [John Young](#) of the Overseas Development Institute (ODI) shared his experience of using some of the principles of Outcome Mapping as part of an evaluation of the impact of some research carried out on dairy policy in Kenya. John's team used a retrospective form of Outcome Mapping to identify behavioural change and the cause of it, alongside the ODI's historical analytical approach to measuring the impact of research (which tracks back from a policy change looking at the key factors which influenced it), and methods borrowed from the International Food Policy Research Institute (which track forward from a given piece of research). The approach was to hold a 2 day workshop with informants who knew the project very well, addressing the following issues:
- Describe the policy environment at the end of the project;
 - Describe the policy environment at the beginning of the project
 - Identify the key policy actors or agents of change;
 - Within the agents of change, identify the boundary partners that are conducive to the change or that influence the policy environment;
 - Describe the behaviours of the boundary partners that are conducive to a change in policy environment or policy;
 - Describe the behaviours of the boundary partners at the beginning of the project;
 - Map the key changes in behaviour for each boundary partner from the start of the project;
 - Map the key changes in the internal environment of the project including organisational changes, outputs and changes in behaviour during the same period;



- Map the external influences including the actions of strategic partners and other exogenous factors during the same period;
- Determine the level of impact/influence of the project on the changes in behaviour of the boundary partners;
- Determine the impact/influence of external influences on the changes in behaviour of the boundary partners and the project;
- Refine the conclusions with in-depth interviews and assess the real contribution of the project to the policy environment

Although these activities took longer than originally intended and many workshop participants had only a partial understanding of the project, it was nevertheless possible to build a useful “map” of how key stakeholders behaviour had changed over the life of the project.

73. [Jocelyn Muller](#) shared insights from her use of OM alongside tools and techniques from the systems theory and the appreciative enquiry paradigms. She has been involved in a qualitative research project looking at women’s views of the potential benefits that basic energy services would bring to their access to ICTs. Outcome Mapping was used to develop a vision and identify strategies towards the realisation of the vision, alongside other tools including the Transformational Attitude Interview (TAI), Focus Group Interviews (FGI) and Free Attitude Interviews (FAI).

The TAIs were used to investigate the women’s ICT “dreams”, to recognise internal and external constraints and to identify the required changes that they would need to implement in order to achieve these dreams. Jocelyn noted that the TAI is based on similar concepts to OM but uses simpler language, pictures and symbols in a way that make it more accessible for use with groups with lower literacy levels.

Additionally, it was easier to formulate the components required for Outcome Mapping having first carried out the TAI’s. When moving from the TAI to Outcome Mapping, the concept of “dreams” translated into the OM vision statement; the mission statement emerged from a summary of the “new inner and outer rings”; the boundary partners emerged from the individuals and organisations that affect or influence your “dream”; and the strategies for the outcome challenges are developed from refining “new inner and outer rings”.

Jocelyn found that two tools derived from Systems Theory were also useful. The affinity diagram enabled the development of a “group dream” (which eventually became the vision statement), and it complemented Outcome Mapping due to the fact that it allows for the participating group to have diverse interests and views represented. The interrelationship diagram was useful for determining the key issues that the development intervention should focus on, which offers to mitigate what Jocelyn sees as the weaknesses of Outcome Mapping in offering a ‘bottom-up’ approach to development. These tools complemented OM in a way that made it more applicable to community participation, and for it to enable community empowerment.

Concluding remarks and points to take forward:

- The Most Significant Change (MSC) technique may be a useful tool to complement Outcome Mapping. One suggestion is that it could prove useful to enhance the OM monitoring and evaluation activities. MSC is being used by many members of the community and they are encouraged to share their experiences as they learn.



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- 'Action Learning days' can be used to complement OM monitoring activities, by offering a space for reflection on issues which may not normally be addressed in monitoring meetings.
- Aspects of OM can be used to help examine the impact of research on policy.
- Transformational Attitude Interviews, affinity diagrams and interrelationship diagrams can be used to complement OM. By carrying these activities out before moving to the OM workshops, OM is made more accessible for community participation.
- Members are encouraged to continue sharing their experiences of using OM with other tools; if enough contributions are received they could feed into a community output on the subject.

Appendix: related discussions

OM and Advocacy 4th – 5th April 2006

Link to discussion online:

http://www.dgroups.org/groups/idrc/OM/index.cfm?op=dsp_showmsg&listname=OM&msgid=354208&cat_id=13913

Original Email

[Oenone Chadburn](#), UK and [Brian Woolnough](#), UK

4th April 2006

Dear 'Outcome Mapping Global Practitioners Group' members.

We are considering using Outcome Mapping as part of our Monitoring and Evaluation processes for a multi-country Disaster Risk Reduction programme that we are embarking upon. We will be working in Malawi, India, Bangladesh and Afghanistan. We have read the literature, and are impressed, but would like to ask of the group two questions;

1. Has anyone any experience of using OM as a tool for Advocacy work? This is one of the strands in our work and we would love to hear from anyone who has used it in this context.
2. We would love to get together, even for an hour, with someone with first hand experience of using Outcome Mapping. Is there anyone 'out there' who either lives and works within access of London, UK, or anyone who is passing through London, or Oxford, at a time when we could catch up with them. The ideal time for us to meet with you in London would be sometime between the 2nd -12th May 2006. We would love to pick your brains and build on your experience.

Hoping to meet up some time.

With all good wishes

Responses were received, with many thanks, from:

1. [Ben Ramalingam](#), UK
2. [Sarah Earl](#), Canada



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Summary of Responses:

1. [Ben Ramalingam](#) offered 3 pieces of information which have relevance for OM and advocacy. First, he quoted Christine Beddoe's report on M & E techniques for advocacy, which argued that OM was useful for advocacy because it focuses on behavioural change and makes a programme be specific about the actors it targets, the changes it expects to see, and so on. Secondly, he referred members to Fred Carden's talk on using research to influence policy, and thirdly he urged members to see Natalia Ortiz's contribution on OM and advocacy.
2. [Sarah Earl](#) suggested that a methodology called 'Naming the Moment' has potential as a partner for OM in planning and assessing advocacy work. One strength of Naming the Moment is that it ensures that you define yourself before looking to influence others, a crucial part of advocacy work which is missing from OM.

Concluding remarks and actions to take forward:

- For Natalia Ortiz's recommendation of OM for advocacy, see '[Strengthening the case for using OM](#)' discussion summary.
- OM helps advocacy work by ensuring that a programme is specific about the actors it targets and the changes it expects to see.
- 'Naming the Moment' should be used when carrying out advocacy within an OM framework: this ensures that an organisation defines *itself* before it looks to influence others.

Spheres of Influence: who is your Boundary Partner?

14th – 16th May 2006

Link to discussion online:

http://www.dgroups.org/groups/idrc/OM/index.cfm?op=dsp_showmsg&listname=OM&msgid=373215&cat_id=13913

Original Email

[Agnieszka Komoch](#), Germany

14th May 2006

Dear All

I'd like to introduce myself to this forum: I am a member of the Latin American Centre for Outcome Mapping, which is an IDRC project coordinated by the International Institute for Facilitation and Consensus (IIFAC). I have organised an OM workshop with Sarah and Beatrice Briggs in Germany 2005 and have since used OM as strategic development tool for community organisations and have given OM courses myself (of different duration and for different audiences). This experience has actually meant that the more I work with OM, the more depth and possibilities I discover in this method and the more I want to learn.



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One of the issues that keep intriguing me (and where I certainly see an opportunity for developing an interesting additional tool in training or facilitating an OM process) is the sphere of influence. Especially when it comes to the question “who is your boundary partner?” it is important that the concept of sphere of influence is clear and grounded. I found the application of this concept to planning and strategies by S. Montague “Circles of Influence” very useful (can be found at <http://www.pmn.net/library/Library.htm>). However, it is still theoretical and not apt for all audiences and I rather design exercises around subjects than give a theoretical presentation (I used to be an academic, but have shifted my approach to education considerably).

I would love to hear if any of you have created exercises that help people grasp the concept either in relation to BPs or to other aspects of organisational reflection. I am not primarily looking for theoretical explanations of the subject (although this can be useful) but for practical approaches.

Any thoughts and experiences will be greatly appreciated.
Regards

Responses were received, with many thanks, from:

1. [Sumana Wijerathne](#), Canada
2. [Ben Ramalingam](#), UK

Summary of Responses:

1. [Sumana](#) felt this is a particularly interesting point- it can be important/useful to influence immediate boundary partners at full strength rather than to attempt to influence every relevant stakeholder.
2. [Ben](#) shared a tool called ‘[Influence Mapping](#)’, which helps organisations identify individuals and groups with the power to affect key decisions, and the main channels through which to communicate with them. Ben added that undertaking an OM process seems to (implicitly or otherwise) involve a process similar to influence mapping, and suggested that it may be worthwhile making it more explicit.

Policy Influencing 23rd August – 3rd September 2006

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=57>

Original Email

[Enrique Mendizabal](#)
23rd August 2006

A query

Some of you might know about RAPID’s work on policy influence. We do some research, advisory work and some capacity building. Our approach has adopted some OM concepts (boundary partners, progress markers) and relies heavily on UNDERSTANDING the context and being



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strategic about the future. UNDERSTANDING the context, however, takes time. Some of the people we are working with now do not have time. They live their lives fire-fighting. From one meeting to the other, negotiating and 'facipulating' their way through a series of very complex political processes. They want tools and skills that will help them change the behaviours of people NOW, not in the future, not slowly. At the same time we recognise that they need to do this without losing track of long term process of change that cannot be overlooked for short term gains.

We are trying to develop a workshop or method that will incorporate both: long term strategic planning and short term tools and skills for changing the behaviours of key policy actors. I feel that OM is the right method to frame the long term policy influencing strategic planning part but I fear that too much emphasis is placed on long term and not enough on the short term needs of many policy entrepreneurs –is 'I expect to see' enough? There are plenty of assertiveness and negotiation tools and skills out there; that deal with their short term needs.

I was gutted not to be able to attend Beatrice's workshop in Brighton –wonder if you can share something with us on that subject (if possible). Do any of you have any suggestion as to how to bring those two (long term, short term) together in a way that does not feel patchy? OM for the long term and 'all these other negotiation/communication/assertiveness tools' for the short term. I fear that if presented that way, then participants will separate them when applying them to their own context and focus, again, on the short term forgetting about the long term.

I wonder if this is just a facilitation skills issue...

Best
Enrique Mendizabal

Responses were received, with many thanks, from:

1. [Sarah Earl](#), Canada

Summary of Responses:

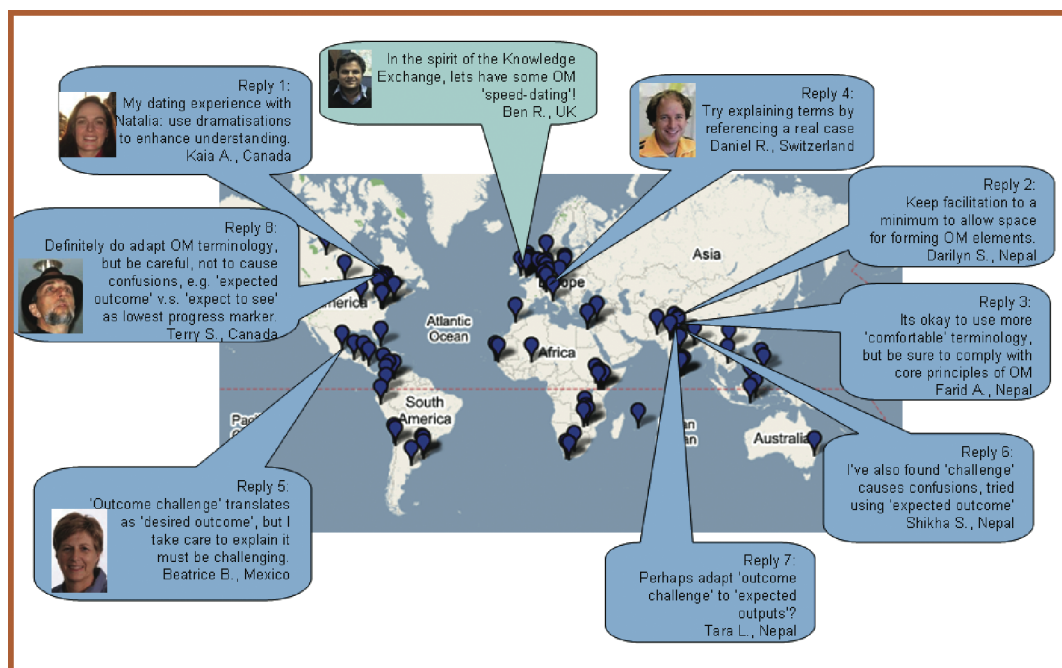
1. [Sarah Earl](#) suggested two tools which may be relevant for short-term policy influence work: 'Naming the Moment', and 'Decision Mapping'.



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3.10 Speed Dating and 'Outcome Challenge' terminology, 17th July – 8th August 2006

Discussion on the OM Community Map:



Discussion Summary

Prepared by Harry Jones

11th December 2006

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=46> and <http://www.outcomemapping.ca/forum/viewtopic.php?t=48>

Original Email

[Ben Ramalingam](#), UK

17th July 2006

Dear All,

In April and May of this year, we ran a OM community "Knowledge Exchange" which attracted around 20 contributions from members around the world. The idea was very simple - to communicate one thing you wanted to share, and one thing you wanted to learn with regards to OM. You can see the visualisation of this Knowledge Exchange here:

<http://www.outcomemapping.ca/resource/resource.php?id=90>

We are continuing this ethos this week, with OM Speed Dating Week!



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If you haven't already done so, now is a great time to spend 5 minutes updating your Member Profiles with photos and map locations, and to add any OM applications you have worked on.

Speed Dating Week is basically about strengthening connections amongst our group as we get bigger and more diverse. We will be running Speed Dating Weeks periodically as we grow. It is very simple.

1. Take a look at the Knowledge Exchange visualisation, and browse the member directory and OM applications
2. See who else is working on OM, and where.
3. Identify a Community member who you don't already know, whose work seems interesting, and email them in order to introduce yourself and exchange your experiences and ideas of OM. Use the subject line "OM SPEED DATE" in your email, so that everyone knows what it is about.
4. If you have a particularly exciting Date, share your experiences with the Community. Happy Dating!

By the way, we have had some excellent submissions to the "Tools to Strengthen OM" discussion thread - keep those posts coming!

Ben

Responses were received, with many thanks, from:

53. [Kaia Ambrose](#), Canada
54. [Darilyn Syiem](#), Nepal
55. [Farid Ahmad](#), Nepal
56. [Daniel Roduner](#), Switzerland
57. [Beatrice Briggs](#), Mexico
58. [Shikha Shrestha](#), Nepal
59. [Tara Lama](#), Nepal
60. [Terry Smutylo](#), Canada

Summary of Responses:

74. [Kaia Ambrose](#) shared her 'dating' experience with a fellow OM community member: Kaia and Natalia Ortiz communicate regularly about OM and have facilitated workshops together. One particularly useful approach they have developed is getting groups to dramatise situations to illustrate progress markers and the outcome challenges. This not only sharpened understanding and enhanced the debate, but helped break the ice and build teamwork with the workshop participants.
75. [Darilyn Syiem](#) shared his experiences of using OM in Nepal, where they decided to alter the term 'outcome challenge statement' to 'outcome statement', as 'challenge' confused the participants. He said that the workshop was particularly successful due to keeping facilitators input to a minimum, which allowed maximum time for participants to work in groups on the vision, mission statements and progress markers.
76. [Farid Ahmad](#) said that he enjoyed the community's lively and diverse discussions, and asked if there were any members who would share their experiences of using and applying OM tools (as opposed to discussing the workshops), and how OM has helped project



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management. He added, in response to Darilyn's suggestion about the term 'outcome challenge statement' that he felt people should use whatever terms they are comfortable with, so long as it complies with the core OM principles of focusing on behaviours, relationships and attitudes of boundary partners.

77. [Daniel Roduner](#) agreed with Farid that specific terminology can be adapted so long as this assists participants' understanding of the core OM principles. He added that it can really help to explain the concepts and theory with reference to a real case.
78. [Beatrice Briggs](#) said that 'outcome challenge statement' best translates in Spanish to 'alcance deseado', or 'desired outcome', but she does take care to highlight to workshop participants that this must represent a challenge.
79. [Shikha Shrestha](#) revealed that she too had experienced a few problems with the term 'outcome challenge', as people often do not understand why it must be a challenge. At first she responded to this by pointing out that there are certain challenges to be conquered to achieve the desired outcomes, but now she tends to use the terminology 'expected outcome', taking care to emphasise that this must be challenging.
80. [Tara Lama](#) shared Shikha's feelings about the terminology, and suggested that 'expected outputs' was easier to grasp.
81. [Terry Smutylo](#) applauded Shikha and Tara's efforts to adapt OM terminology to fit comfortably with the languages and cultures where it is being applied. He urged a note of caution, however, not to lose the idea of 'aiming high' when substituting another term for 'outcome challenge', which needs to be ambitious and motivating yet realistic and achievable. There may also be a problem with the lowest category of progress marker being 'expect to see' and the highest level of intended change being 'expected outcome'.

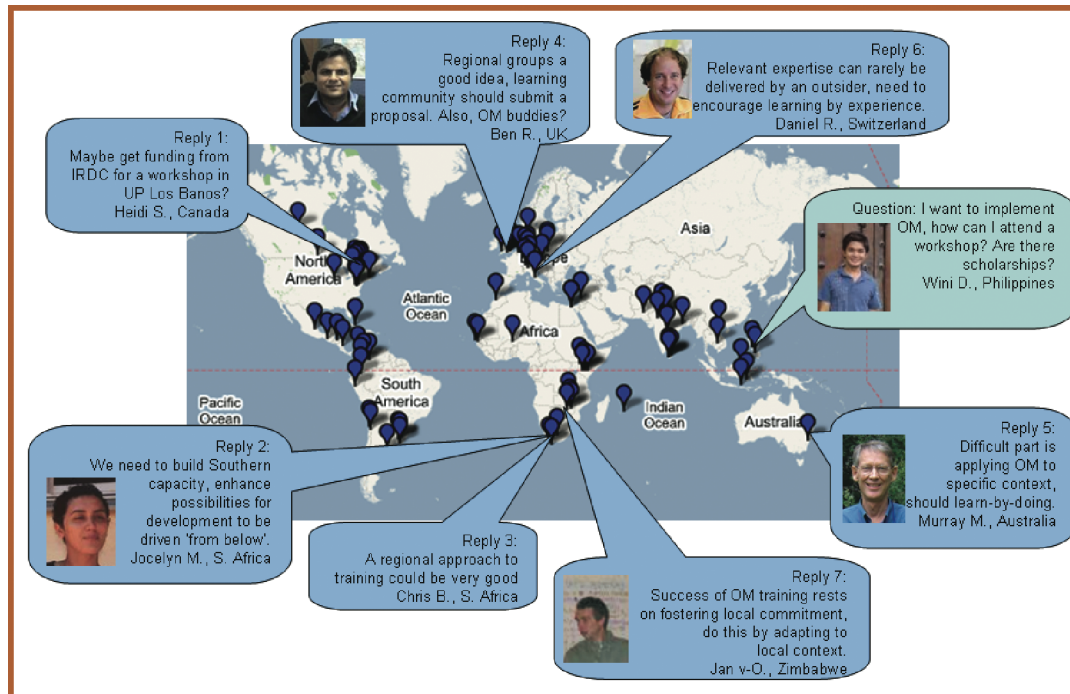
Concluding remarks and actions to take forward:

- It is particularly worthwhile for OM community members to share experiences, on a one-to-one basis (with 'speed dates') as well as in a group.
- It is important to adapt OM terminology to aid local understanding and buy-in, but we must also be careful to not depart from the core principles of key OM concepts.



3.11 Workshop in the South-East, 26th July – 8th August 2006

Discussion on the OM Community Map:



Discussion Summary

Prepared by Harry Jones

2nd January 2007

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=50>

Original Email

[Wini B. Dagli](#), Philippines

26th July 2006

Dear Outcome Mappers,

I have been a member of this mailing list since May and this is my first time to post a message on our dgroup. Even before this dgroup was created, I have been studying the OM manual that I downloaded from the OM Interactive CD. Back then, I just started working as a project officer of an IDRC-funded project on participatory development communication (www.allincbnrm.org). Since I'm in-charge of ensuring that the project is doing well, I'm making sure that we are putting enough attention on how to monitor and map the project's outcomes/ impacts.

This is an improvement from the previous PDC program (www.isangbagsak.org) that we are trying to make here in the ALL in CBNRM program. For example, we began to lay down the plans for the



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M&E at the start of the program and this wasn't the case in the previous program. However, I envision a framework which follows the outcomes as it evolves during the program, and tracks the changes over time. Right now we are still culling out the indicators from our participants from six countries. But the concrete plan and guidelines on how to go about it are still to be agreed upon.

I'm thinking of introducing some OM principles to the framework or better yet, implement OM as our evaluation framework. I've read all your emails about OM workshops and I'm thinking of ways on how I can attend an OM workshop. Ben, would it be possible to conduct an OM workshop here in the Philippines or somewhere here in Southeast Asia? I really want to validate my secondhand knowledge in a face to face discussion of the process. Or would there be someone or an institution that can offer funding to persons like me, who want to participate in a workshop but doesn't have the means to do it.

Please advise.

Responses were received, with many thanks, from:

- 61. [Heidi Schaeffer](#), Canada
- 62. [Jocelyn Muller](#), S. Africa (2 contributions)
- 63. [Chris Burman](#), S. Africa
- 64. [Ben Ramalingam](#), UK
- 65. [Wini Dagli](#), Philippines
- 66. [Murray Millar](#), Australia
- 67. [Daniel Roduner](#), Switzerland
- 68. [Jan Van Ongevalle](#), Zimbabwe

Summary of Responses:

- 82. [Heidi Schaeffer](#) welcomed Wini to the OM community, said that the University of the Philippines Los Baños would be a great place to host OM training, and suggested Wini contacts Guy Bisette of IRDC to enquire about funding. She suggested that a quick solution may be to assign Wini a mentor from the OM community, and offered to provide help via email.
- 83. [Jocelyn Muller](#) supported Wini's request for local training workshops and for funds to be made available for those who want to attend OM workshops. She believes that for development initiatives to be driven 'from below', peoples' capacity for engagement needs to be developed, which requires a significant amount of training. She said that it was a key activity to develop Southern expertise, and suggested this could be done by training core groups in each region who could go on to train others.
- 84. [Chris Burman](#) agreed that a regional approach would have the potential for significant impact.
- 85. [Ben](#) supported Jocelyn's idea to train regional groups, and suggested the community form a working group to discuss the matter then submit a proposal. He also supported the idea of OM mentor/buddy relationships, and urged members to volunteer.



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86. [Wini](#) agreed that UP Los Banos would be an interesting place to hold an OM workshop due to the likely interest from the academic staff. She agreed that mentoring would be a good cost-effective tool to aid her learning, but emphasised that she needed to attend a workshop as well. She added that Sarah Earl had mentioned that there would be an OM workshop in Asia in 2007, for which there may be scholarships available.
87. [Murray E. Millar](#) applauded Jocelyn's passion for development initiatives to be driven from below, but suggested that this may be at odds with her assertion that those in the South need training by external experts. He suggested that while the OM handbook offers basic guidelines, the main challenge is to apply it to a specific, local situation; he urged people to have the courage to move forward with the knowledge they have already, and learn as they go along.
88. [Jocelyn](#) replied that she saw developing local capacity and working with indigenous knowledge systems as in fact mutually supportive. She stressed the importance of the participation of the majority of the population in the process of development, and that to this end development should work to strengthen peoples' capacity to participate positively in social change. She said that the poor and the marginalised always have many capacities, but that often they may not recognise this themselves, and that time and care needs to be taken to help them reach their potential.
89. [Daniel Roduner](#) said that although he is himself a consultant, he feels that the relevant expertise can often not be delivered by an outsider. Local knowledge and ways of doing things are crucial. He said that expensive experts from the North are not necessarily needed, and that a guided 'learning by doing' approach is beneficial: a short overview of OM enriched with personal and practical experiences can be all that is needed to start people off.
90. [Jan Van Ongevalle](#) emphasised that the success of OM training largely rests upon of fostering the commitment of the local team who will be going on to implement the framework. To do this it is important to spend a significant amount of time adapting it to the specific local context, in the initial OM training.

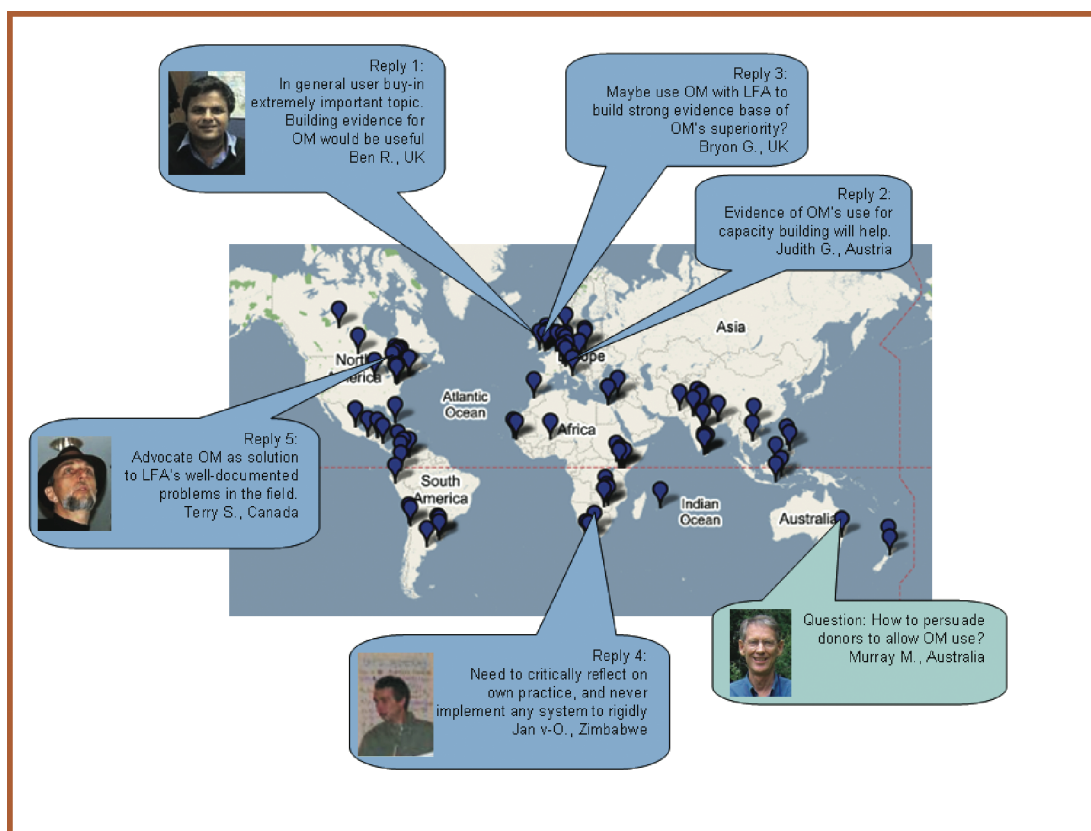
Concluding remarks and actions to take forward:

- To support OM and those who intend to implement it, it will be very important to provide training workshops.
- One way to do this may be on a regional model, training core groups in each region who can go on to train others.
- OM 'buddy' (or 'mentor') relationships will be a simple and cost-effective way of supporting those learning to use the framework. It is important that community members volunteer to help!
- Having said this, we must not forget that harnessing local knowledge and methods and adapting OM to the context in which it is being applied, are crucial to the success of development programmes.



3.12 Donor Buy-In, 7th – 16th September 2006

Discussion on the OM Community Map:



Discussion Summary

Prepared by Harry Jones

7th December 2006

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=60>

Original Email

[Murray E. Millar](#), Australia

7th September 2006

Dear outcomemappers,

I recently had an email exchange with an OM practitioner that I thought would be worth sharing with you all and see if it could generate further ideas and suggestions:

I wrote: "I am currently working on facilitating the design of a program in PNG to help in the management and prevention of Sexually Transmitted Infections. I am intending to use OM from the beginning to inform the design and see if I can argue with the donor to allow us to only use OM and



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not have to complicate the management of the program with a logframe as well. I am interested if you have any experience in presenting arguments to donors in this respect and if so, what would you recommend”.

Daniel's response: “How to convince donors? This is not an easy task. To change the behaviour of a donor agency, you need time, commitment and different strategies. We planned it like an OM process and established some progress markers for the donors. This goes from showing interest, to read case studies, to visit trainings, to test OM on a pilot phase etc. Currently I am evaluating an internal working group of SDC with OM and one of the main objectives is 'to test OM' and 'to train SDC staff' in the use of OM.

What would I do in your place? I would prepare a short (and maybe fictitious) OM plan for the upcoming "management and prevention of Sexually Transmitted Infections program". Show the donor what does OM concretely mean; how could the vision and mission statement be; who are the boundary partners and what are their outcome challenges; talk about the progress markers and the possibilities of the program to develop strategies for supporting the achievement of the challenges & progress markers.

Based on the example you list the main advantages; for example:

- Things do not just change; it is the people and organisations that have to change
- Especially in the context of sexually transmitted infections, PEOPLE have to change their behaviour
- Different partners have different roles and responsibilities, it is important to name them from the very beginning
- The program will not be able to change the situation, the boundary partners are; and each BP needs different kinds of supports in order to meet its challenge
- Outcome Mapping has developed from the social work and social engineering, not like LFA (army & engineers), and within the given context, the OM approach could be much more helpful.

Additionally, most donors like to be: flexible, up to date, innovative etc.; OM gives them a chance to be that”.

I welcome other comments on this topic.

Responses were received, with many thanks, from:

- 69. [Ben Ramalingam](#), UK (2 contributions)
- 70. [Judith Galla](#), Austria
- 71. [Bryon Gillespie](#), UK (2 contributions)
- 72. [Jan Van Ongevalle](#), Zimbabwe
- 73. [Terry Smutylo](#), Canada

Summary of Responses:

- 91. [Ben](#) felt that user buy-in is a very important topic for the learning community. He argued that although it may in practice prove difficult to carry out, systematically building evidence for OM would be very useful to build a case for OM and would help adapt and improve the methodology. He suggested that the growing evidence of the shortcomings of the log frame (for example see <http://www.outcomemapping.ca/resource/resource.php?id=94> could be tapped into to provide more space to use OM.



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92. [Judith Galla](#) referred members to a paper which names OM as a useful approach for monitoring and evaluating capacity and capacity building, suggesting that this could be used to justify OM to donors (<http://www.ecdpm.org/dp58B>).
93. [Bryon Gillespie](#) noted that when advocating the use of OM, progress often stalls when the discussion reaches the stage where it must be decided which system is better than the other. He suggested that an evidence base could be built for OM by using the two systems in parallel: if a project being steered with OM showed positive trends in LFA indicators then this would provide evidence that mainstream organisations would be more likely to understand and take on board.
94. [Ben](#) applauded Bryon's contribution, and added that this process of combining OM and LFA has been happening in a number of places both explicitly and implicitly. However, the idea of doing so in order to generate evidence for OM is new, interesting and well worth examination.
95. [Jan Van Ongevalle](#) contributed his experiences of using OM and LFA. His organisation St2eep started by using LFA in 2003, but soon began to realise that it was not sufficient to address certain challenges such as the future sustainability of the project and clarifying responsibilities of the different actors. Since January this year they have been using OM at the operational level, drawing on the LF to develop yearly operational plans grounded in OM and using the LFA for their yearly report to donors. Jan said it is important to critically reflect on ground level impacts and adjust methods accordingly, and urged members not to implement any project management tool too rigidly. He added that implementing any new system between two actors takes time, and requires a healthy and trusting partnership.
96. [Terry Smutylo](#) suggested that donors are more comfortable with the LFA due to giving them what they need to know given their distance from ground-level activities, whereas OM is suitable for those working in the field, dealing directly with the dynamic complexities of social change in which they are immersed. It might be wise to present OM as the solution to the well-documented problems of the LFA, by bridging it to the field. This would lead to seeing the LFA as good for the initial, largely uninformed planning done for funding purposes, and OM as best used for supporting implementation, monitoring and learning in the field.
97. [Bryon](#) replied that what seems to be needed here is an interface or adaptor so that information can be translated from OM into a log frame 'receptacle'. This would aid the building of evidence in the manner he referred to earlier, which may prove to be the only type of evidence which would serve to convince those in the mainstream currently dedicated to LFA.

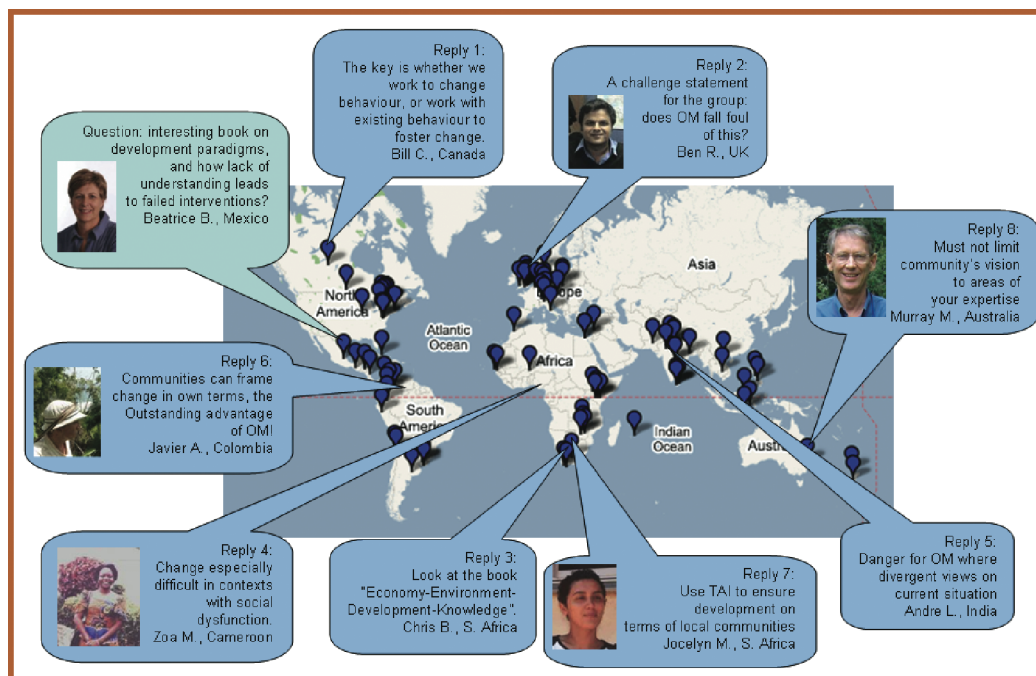
Concluding remarks and actions to take forward:

- To increase donor buy-in, we need to build up and draw upon the evidence base for OM, and we should be prepared to highlight the failings of other systems.
- Donors are often more comfortable with the LFA; one interesting approach might be to run both OM and LFA side-by-side in order to demonstrate the benefits of OM in LFA measures.
- Another approach may be to accept that the LFA is more suited to the donors perspective on development, and present OM as the key to bridge LFA 'to the field', using OM to support and adapt your project and feed into reporting to donors using a log frame.



3.13 Reflections on development paradigms, 24th September – 22nd November 2006

Discussion on the OM Community Map:



Discussion Summary: Reflections on development paradigms

Prepared by Harry Jones

4th December 2006

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=62> and <http://www.outcomemapping.ca/forum/viewtopic.php?t=76>

Original Email

[Beatrice Briggs, Mexico](#)

24th September 2006

I recently read *The Places in Between*, by Rory Stewart. The author, a Scottish journalist, tells the story of a 36-day walk he took from Herat to Kabul in the winter of 2002, shortly after the fall of the Taliban. Among the many interesting things he has to say about contemporary, rural Afghanistan, are his comments about the efforts of foreign governments and international development agencies to effect change in countries they do not understand well. For me, Stewart's reflections are useful arguments for the change in development paradigm of which Outcome Mapping is a part. A few quotes from the book follow.



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“Most of the policy makers knew next to nothing about the villages where 90 percent of the Afghan population lived. They came from postmodern, secular, globalized states with liberal traditions in law and government. It was natural for them to initiate projects on urban design, women’s rights, and fiber optic cable networks; to talk about transparent, clean and accountable processes, tolerance, and civil society; and to speak of a people “who desire peace at any cost and understand the need for a centralized, multi-ethnic government”. (p. 246)

“Policy makers did not have the time, structures, or resources for a serious study of an alien culture. They justified their lack of knowledge and experience by focusing on poverty and implying that dramatic cultural differences did not exist. They acted as though villagers were in interested in all the priorities of international organizations, even when those priorities were mutually contradictory....Without the time, imagination, and persistence needed to understand Afghans’ experiences, policy makers would find it impossible to change Afghan society in the way they wished to change it.” (p.247).

Responses were received, with many thanks, from:

- 74. [Bill Cowie](#), Canada
- 75. [Ben Ramalingam](#), UK (3 contributions)
- 76. [Chris Burman](#), S. Africa
- 77. [Zoa Ngoyere Mirelle](#), Cameroon
- 78. [Kaia Ambrose](#), Canada
- 79. [Andre Ling](#), India
- 80. [Javier Pachero Arrieta](#), Colombia (2 contributions)
- 81. [Jocelyn Muller](#), S. Africa
- 82. [Murray E. Millar](#), Australia

Summary of Responses:

- 98. [Bill Cowie](#) suggested members should look at “The Power of Greed” by Michael Rosberg, which is a good documentation of the problem of development assistance failing to take account of local conditions. Rosberg argues that development interventions frequently ignore local societies’ economic survival behaviours, and take the approach that behaviour should be changed, rather than working with existing behaviour to foster change. This approach is bound to be unsuccessful, and the behaviour required to survive in these societies will simply reoccur.
- 99. [Ben Ramalingam](#) thanked Beatrice and Bill for their contributions, and suggested the group focus on how this issue relates specifically to Outcome Mapping. He offered a challenge statement: “Despite OM’s focus on a “new paradigm for development”, the fact that it doesn’t include any technique for assessing existing contexts, powers, interests or relationships means that OM could easily lead to the kind of flawed projects and programmes which were highlighted by Bea and Bill” (that take the approach that behaviour should be changed, rather than working with existing behaviour to foster change).
- 100. [Chris Burman](#), who is preparing to use OM as part of a research project, felt that a discussion of development paradigms could be usefully informed by the book “Economy-Environment-Development-Knowledge” by Dr. K. Cole, which examines the beliefs that shape the intellectual parameters of approaches to development.



101. [Zoa Ngoyere Mirelle](#) agreed with Bill and Bea, and added that it is very difficult to build change in contexts characterised by social dysfunction, especially where there is an absence of mechanisms for communication, organisational weaknesses and low technical and financial capacity to build change. She added that she is currently addressing these issues in her research project, which is looking at how partnerships can build local governance and help socio-economic development, in the context of the forests of Cameroon.
102. [Ben](#) called for members to volunteer to be Chris's 'OM buddy' to mentor his using OM, reiterated his challenge statement, and reminded members that there are plans to facilitate discussions in French, Spanish and German in the future.
103. [Kaia](#) offered to be Chris's OM buddy adding that she thought it was a good system for learning, and indicating that she will be including it in some documentation on OM she will be doing over the next few months.
104. [Andre Ling](#) felt that Ben's challenge statement is worth exploring in depth. Firstly, it could be argued that since local partners are involved in framing their own vision, mission, outcome challenges and process markers, it is likely that these will be implicitly informed by their knowledge of existing behaviours and relationships. However, the fact that they are *implicitly* informed could lead to problems in the (likely) situation that there are divergent views on the situation.

He outlined an ongoing project he is involved with, in which he is looking to expand the historical timeline component of OM to include an assessment of not just existing patterns of behaviour, relationships and perceptions, but an assessment of their evolution over time. This will be done prior to the development of an OM system through conducting Appreciative Inquiry, and will hopefully make existing practices, behaviours and relationships transparent to the project team, as well as priming the community for the articulation of outcome challenges, progress markers etc.

Andre argued that the real challenge for OM is in situations demanding rapid deployment. While ideally we would always involve local partners in formulating the vision, outcome challenges, etc, when pressed for time Andre felt that it is an acceptable compromise to put these in place without consultation, to give the project a starting point. We should see the development project as a learning process, and not focus on putting in place an OM system above everything else. Simple and easily communicable hypotheses can be put in place to begin with, and these can be redefined on the basis of lessons learned as the project develops, to ensure that we 'learn-for-and-from-doing'.

So, OM will only lead to flawed projects in the manner described by Bill and Bea if OM users misplace the emphasis of implementing the process, and focus on formal requirements of having the system in place ahead of learning and adapting their projects. Unfortunately, donors are not very receptive to this approach of 'evolving' projects.

105. [Javier Arrieta](#) argued that it is important to recognise that intervention initiatives have their limitations, and it is essential to enhance the possibility of endogenous change lead by local stakeholders. He believes that an "outstanding advantage" of OM is that it respects the



cultural codes and ways of life in the community by framing change ‘in their own words’, and he is currently writing a manual to facilitate communities in doing this.

106. [Jocelyn](#) referred discussants to her contribution to the discussion about using tools to complement and strengthen Outcome Mapping. Transformational Attitude Interviews (TAI) are useful for allowing local stakeholders to define and lead development interventions, which then feeds into the OM process. As the TAI is grounded in the Appreciative Inquiry paradigm, the focus is on positive change initiated by the individual, and is therefore an expression of “cultural codes and ways of life and the way the community wants to modify it”. Jocelyn posed the challenge that this may not truly be possible so long as development interventions are limited to the sector the initiator is involved in. For example, in her project about energy and poverty, if research participants identified new avenues (instead of improved energy services) as their vision, what should she do?
107. [Murray Millar](#) answered Jocelyn’s challenge, stating that development organisations should *not* limit a community’s vision to areas in which they have expertise, and they should be careful to not unconsciously cause this. The nature of a ‘vision statement’ makes it very plausible that it may encompass aspects beyond the expertise and capability of your organisation, although the mission statement *can* identify specific areas your organisation is able to focus on. Where your organisation has no expertise in any of the components included in the vision, you must simply find another community to assist.
108. [Javier](#) promised to give his reaction to recent developments in the discussion.

Concluding remarks and points to take forward:

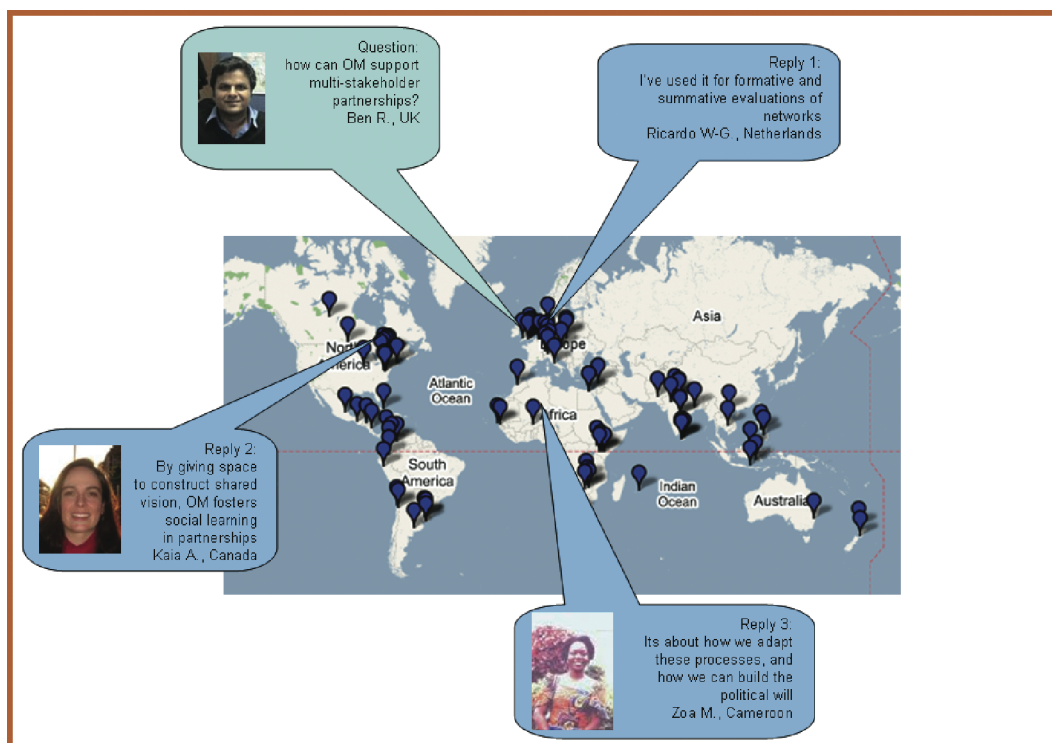
- There is clearly a challenge for all development paradigms to be responsive to local needs, and to work with existing behaviour to foster change. This is no different for Outcome Mapping, and it is important to discuss how best to meet this challenge.
- Some see the fact that OM does not include a method for explicitly assessing existing behaviour and relationships as a potential weakness in its ability to meet this challenge. OM could be strengthened in this regard by carrying out an enhanced ‘timeline’ activity or using ‘community friendly’ tools such as TAIs to feed into the setting up of the OM elements.
- There are strong reasons to believe that OM offers marked advantages over other approaches due to being able to frame community’s envisioned change ‘in their own words’, especially where participation is fostered in a way which allows for effective community engagement (Javier is writing a manual on this).
- It is important that organisations should ensure they do not unconsciously bias communities in choosing their vision, etc. towards the sector which your organisation works in. This entails being prepared to move to help another community if it is clear that your organisation cannot provide assistance for any part of the vision statement.



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3.14 Outcome Mapping and Partnerships, 4th – 19th October 2006

Discussion on the OM Community Map:



Discussion Summary:

Prepared by Harry Jones

5th December 2006

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=64>

Original Email

[Ben Ramalingam, UK](#)

4th October 2006

Dear All,

One of ODI's programmes has recently been involved in the launch of the Partnership Declaration (see <http://www.thepartnershipdeclaration.org/mainpages/read/index.php>), which is a call to action for leaders and decision makers to work to realise the full potential of multi-stakeholder partnerships.

The principle behind this is that, although multi-stakeholder partnerships are now a tried and tested approach to the intractable problems of poverty, environmental degradation and weak governance, their full potential remains untapped. The declaration calls for further commitments from leaders in all sectors in order to create a dramatic leap in our collective ability to meet sustainable development goals.



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Specifically, the Partnership Declaration calls upon leaders and decision makers across sectors to:

- [i]“1. Revise existing policies to maximise the strategic value of multi-stakeholder partnerships.[/i]**
- [i]2. Use your personal leadership to energise a culture of collaboration throughout your organisation and networks.[/i]**
- [i]3. Adopt procurement procedures that stimulate, rather than inhibit, innovative partnerships.[/i]**
- [i]4. Treat the governance of multi-stakeholder partnerships as seriously as you treat other important commitments. [/i]**
- [i]5. Maximise the potential of your staff as partnership practitioners, [/i]for example, by revising staff appraisal criteria, investing in skills training and rewarding collaborative risk-taking.**
- [i]6. Jointly measure qualitative as well as quantitative results, [/i]such as relationships, innovation, and new norms and practices.**
- [i]7. Create a culture of good partnering behaviour by genuinely respecting the contribution of others.”[/i]**

There seems to be a clear potential for OM here!

Does anyone have any specific ideas or examples about how Outcome Mapping can help support the principles of multi-stakeholder partnerships working towards social goals?

Responses were received, with many thanks, from:

- 83. [Ricardo Wilson-Grau](#), Netherlands
- 84. [Ben Ramalingam](#), UK
- 85. [Kaia Ambrose](#), Canada (2 contributions)
- 86. [Zoa Ngoyene Mireille](#), Cameroon

Summary of Responses:

- 109. In [Ricardo Wilson-Grau](#)’s work as a consultant, he has adapted Outcome Mapping for performing a summative evaluation of international networks of social change actors (see *Evaluating International Social Change Networks: A Conceptual Framework for a Participatory Approach* at <http://www.mande.co.uk/networks.htm>). He is currently using Outcome Mapping in his work on multi-sectoral partnerships (business, government and NGOs in particular), for monitoring and producing formative and summative evaluations.
- 110. [Ben](#) thanked Ricardo and urged him to keep the community posted on his adaptations of OM principles and concepts, and added that he felt this would be a very important area in the future. He urged Ricardo to share more about how and why he adapted OM for his purposes, and any challenges he faced in doing this.
- 111. [Kaia Ambrose](#) shared her experiences with multi-stakeholder partnerships and networking. She argues that OM helps build partnerships by fostering social learning through providing a space for different stakeholders to come together to construct a common vision. They then understand that to achieve their vision they need to work in a collaborative manner. Responding to Ben’s challenge about what challenges are posed by introducing OM to people with “very different mindsets and goals”, she argued that the key element is bringing people together to understand that they have a common interest. Through careful facilitation, they can be brought to realise that they have a common interest, that they are in fact interdependent on one another to achieve that interest, and they can then be started off



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with small, collective ‘nuggets’ of action.

112. [Kaia](#) then directed the community’s attention to Wageningen International’s course on ‘Facilitating Multi-Stakeholder Processes and Social Learning’ (http://www.wi.wur.nl/UK/newsagenda/agenda/Facilitating_multistakeholder_processes_and_social_learning.htm), a resource portal on MSPs and social learning (<http://portals.wi.wur.nl/msp/>) and a resource portal on ‘Participatory planning, monitoring and evaluation. Managing and learning for impact’ (<http://portals.wi.wur.nl/ppme/>).
113. [Mireille](#) felt that the important questions to address here were how we can plan, evaluate and *adapt* ongoing processes of building partnerships. What resources and capacities are needed, and how can the political good will can be built?

Concluding remarks and actions to take forward:

- It seems that evaluating partnerships is a strength of Outcome Mapping, and promises to be an important area in the future
- OM helps strengthen partnerships through fostering social learning.



3.15 Categories of Change in 'outcomes', 11th – 19th October 2006

Discussion on the OM Community Map:



Discussion Summary:

Prepared by Harry Jones

11th December 2006

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=64>

Original Email

[Ricardo Wilson-Grau, Netherlands](#)

11th October 2006

Colleagues,

The 2001 IDRC definition (the latest "official" definition I have) of outcomes is the "changes in the behaviour, relationships, activities and actions of the people, groups and organisations with whom a program works directly." I do not see a difference between activities and actions, or between behaviour and actions.

I have tried unsuccessfully to find a satisfactory answer at the website. Can anyone explain to me how you distinguish conceptually between the four categories of changes?



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Many thanks,
Ricardo Wilson-Grau

Responses were received, with many thanks, from:

- 87. [Stefan Dofel](#), Kenya
- 88. [Bryon Gillespie](#), UK (2 contributions)
- 89. [Chris Burman](#), S. Africa
- 90. [Zoa Ngoyene Mireille](#), Cameroon
- 91. [Ricardo Wilson-Grau](#), Netherlands
- 92. [Fred Carden](#), Canada

Summary of Responses:

- 114. [Stefan Dofel](#) shared Ricardo's feelings about the lack of distinctions between the categories, he sees actions and activities as one and the same, and sees both of them as outflows from behaviour. He suggested replacing 'actions' with 'attitudes' in the IDRC definition.
- 115. [Bryon Gillespie](#), accepted that "behaviour, relationships, activities and actions" do overlap, but suggested that members were trying to find a level of rigour which wasn't intended in IDRC's definition. Rather, he sees these 4 categories as intended to help lead peoples' thinking towards the sorts of things that their programme should aim to change, and which can be observed changing.
- 116. [Chris Burman](#) offered the thoughts of a 1920s Russian psychologist Vygotsky, who defined an activity as a generally shared objective, an action as a conscious move to do something to achieve an objective, and an operation as a routine or second nature event. Chris argued that analysing our terminology can help us make decisions about matters when challenged by unfamiliar situations or contexts.
- 117. [Zoa Ngoyene Mireille](#) said that actions and methodologies, activities and impact, relationships and organisational approach could stay together.
- 118. [Ricardo](#) thanked those who had participated so far in the discussion, he felt that he now understands that the intention is not to strive for crystal clear conceptual clarity but rather accept the overlapping and non-exclusive nature of the 4 categories of changes. He offered a new working definition: "“Outcomes” in OM focuses on the *observable changes* (behaviour, relationships, activities, actions) in the people, groups and organisations with whom a programme works directly that potentially will contribute significantly to the vision the programme seeks to achieve”.
- 119. [Fred Carden](#) agreed with Ricardo's new definition, and suggested that the overlap in meaning of the elements constituting 'outcomes' reflects the overlapping and non-exclusive nature of development.
- 120. [Bryon](#) offered another alternative definition for 'Outcomes' as "observable changes (behaviour, relationships, activities, actions) in the people, groups and organisations with whom a programme works directly, *and with whom such changes are necessary for the*



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programme to achieve its vision". His new definition includes the idea of boundary partners, which Bryon sees as inseparable from the concept of outcomes.

Concluding remarks and actions to take forward:

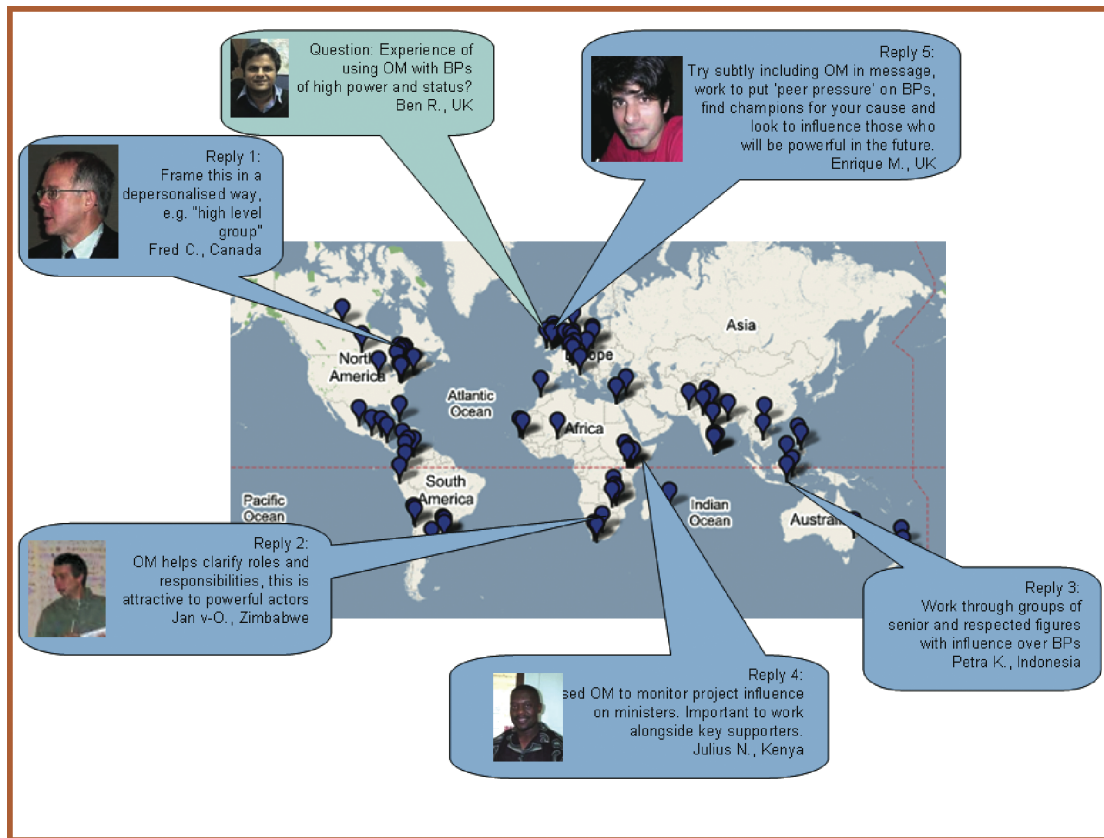
- IDRC's specification of change involving "behaviour, relationships, activities and actions" is not meant as a rigorous definition with strict distinctions between terms. It is to mark out the key area for change, intended to guide a shift in the focus of development interventions.
- While it is quite likely that there is some overlap (as well as some distinctions) between the terms, this is not problematic, and echoes the nature of social change and development.
- OM users should adapt the system and definitions where they feel this will benefit their work and understanding [circularity ?].



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3.16 Bringing in powerful boundary partners, 26th October – 12th November 2006

Discussion on the OM Community Map:



Discussion Summary: Bringing in Powerful Boundary Partners

Prepared by Harry Jones

6th December 2006

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=70>

Original Email

[Ben Ramalingam, UK](#)

26th October 2006

Does anyone have any experience of facilitating Outcome Mapping with groups of high power and status? For example, how do you get political leaders (at whatever level) to accept the need for own behaviour change, and start them working towards it? Is it possible?

Ben



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Responses were received, with many thanks, from:

- 93. [Fred Carden](#), Canada
- 94. [Jan Van Ongevalle](#), Zimbabwe
- 95. [Petra Karetji](#), Indonesia
- 96. [Ben Ramalingam](#), UK
- 97. [Julius Nyangaga](#), Kenya
- 98. [Enrique Mendizabal](#), UK

Summary of Responses:

- 121. [Fred Carden](#) suggested a reframing of Ben's question, to depersonalise it: "how do you use OM with a high-level group thinking about change in their system, whether a complex organisation or part of a national system (i.e., an institution)?"
- 122. [Jan Van Ongevalle](#) remarked that there is often little clarity and consensus about the roles and responsibilities of different stakeholders at whatever level within many systems, and argued that OM is extremely useful to address these issues. For example, he ran a workshop with donors and ministry administrators specifically to clarify their roles, in which they came up with a separate OM system for them altogether, which has resulted in improved clarity of roles and responsibilities, and increased opportunities for influence.
- 123. [Petra Karetji](#) shared her experiences of using OM with influential groups in Eastern Indonesia. Her programme got support from a small number of senior and respected figures, who formed a loose group that is well-respected by boundary partners, and able to influence them. This group also served as an advisory board for their project, which helped ease some BP's suspicions.
- 124. [Ben](#) thanked Fred, Jan and Petra for their contributions. He outlined what he saw as their key points: Jan used OM to clarify roles, paying extra attention to the 'heavyweights' position, resulting in the great success of having the donor as a mutual boundary partner. Petra developed a group of 'champions' as a special boundary partner, which had influence and leverage over the others. Ben suggested that this group could be viewed as part of the programme's strategy map, as they serve to amplify and strengthen the programme team's work.
- 125. [Julius Nyangaga](#) shared his experiences with the ILRI's Smallholder Dairy Project in Kenya (see http://www.odi.org.uk/rapid/Publications/RAPID_WP_266.html) as a successful example of influencing powerful policy makers. To ensure that ILRI's message reached them, ILRI worked closely with relevant supporters, such as local government departments and civil society, co-ordinating information sharing and communication at all levels.
- 126. As [Enrique](#) sees it, the message from this discussion is that we need to be strategic about 1) how to include powerful people in an OM process, 2) how to tell powerful people that they need to change their behaviour and 3) how to convince powerful people that we have something to contribute to processes under their control.

In relation to 1), Enrique advised that unless there is a clear demand for OM, it is best to 'smuggle' it into your message, and use it as a guiding framework for yourselves, not for



them. By talking about “changes in the way we do things” rather than “behaviour changes” it is possible to include powerful people in an OM process without facing the initial barrier of justifying OM. For 2), pilot projects are very useful, as they are “evidence of action” as opposed to “evidence of opinion”, their influence is less open to being contested. He also agreed that ‘peer pressure’ effects are a good channel for influence, as powerful people are often more likely to follow the lead of others in a similar position (e.g. Peruvian economic policy tends to copy Chile’s). Convincing powerful people to listen to your contribution, 3), Enrique sees as the most challenging activity, and strongly depends on the nature of the powerful people themselves. Finding champions within the political context should be a priority, and some interesting work is being done which highlights the possibility of looking to influence people who are likely to be powerful some years in the future. Enrique recommended community members should look at the work of RAPID (www.odi.org.uk/rapid), and Ben’s work on Social Network Analysis (http://www.odi.org.uk/RAPID/Tools/Toolkits/KM/Social_network_analysis.html).

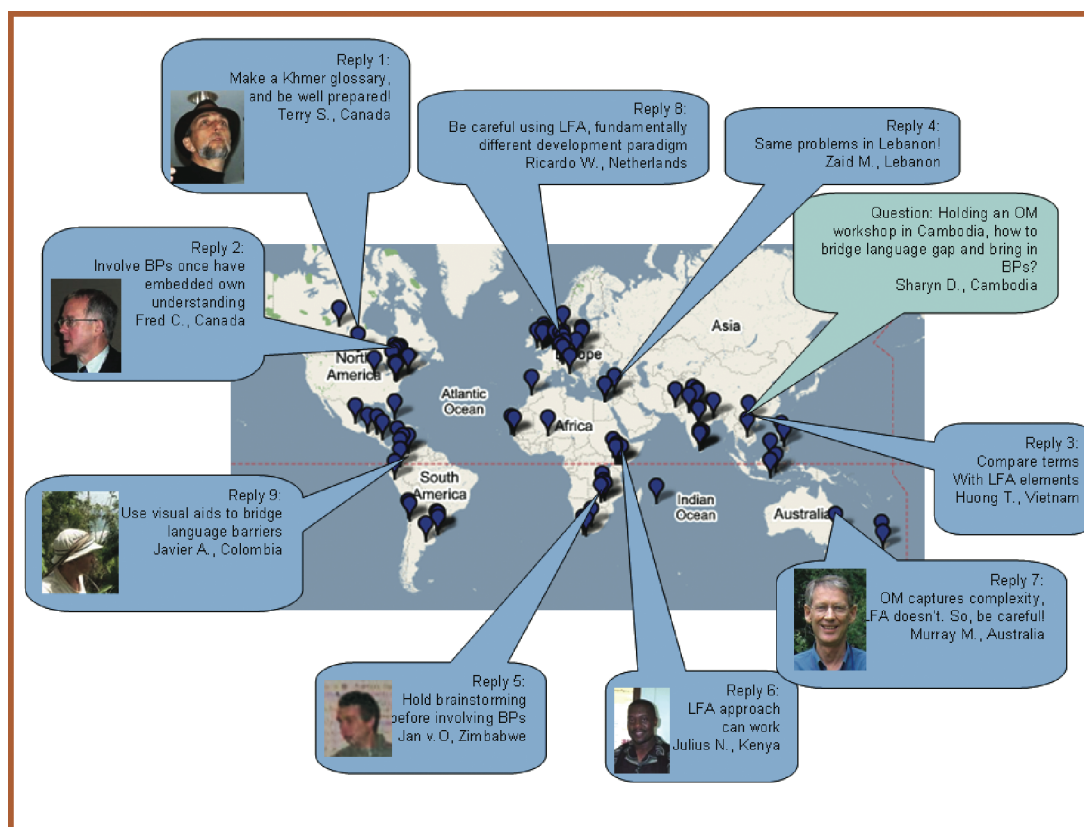
Concluding remarks and actions to take forwards:

- OM is particularly useful to clarify roles and responsibilities between boundary partners, which can be highlighted to increase the involvement of more powerful actors.
- 3 effective ways of persuading powerful BPs are to use evidence from pilot projects, to work to influence their peers, and to identify and capitalise on groups of ‘champions’ who hold influence over BPs.



3.17 OM in Cambodia, 2nd – 20th November 2006

Discussion on the OM Community Map:



Discussion Summary: OM in Cambodia

Prepared by Harry Jones

5th December 2006

Link to discussion online: <http://www.outcomemapping.ca/forum/viewtopic.php?t=71>

Original Email

[Sharyn Davis](#), Cambodia

2nd November 2006

Dear All,

We have recently commenced an Integrated Rural Development Project in Cambodia (agriculture, water, learning, groups, etc.) which we intended to incorporate OM as a key m&e tool. We are currently planning our first OM workshop for December and I have been going through all the great resources online – it seems all the preparation has been done and is available for use!! Thank you everyone for that. A few questions I have:



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- I noticed that there was a workshop conducted in Cambodia for the FAO in September 2003. Does anyone know who was involved in this training? I would like to know of any results from this ... whether it was effectively used.. also if there are any resources in Khmer that they developed at the time.
- What we are planning will be facilitated in both English and Khmer. I am imaging that some of the concepts will be difficult to get across in Khmer and that this will take the usual 3 day workshop well beyond that. The Cambodian development scene and players are used to these bi-lingual workshops but the English terms become such jargon and often very mixed up... mission and vision and outcomes and outputs and objectives and all used interchangeably!! We potentially could spend the whole time on defining the terms and still not have a full operational understanding of them (I am being pessimistic here but just spend a number of days on group translating baseline survey questions-very frustrating!) Does anyone have any tips on facilitating in this kind of situation and how to avoid getting hung up on terminology but still ending up with an effective understanding of them?
- On who to invite to this initial workshop... on reading in the manual, it mentions that OM is a participatory process and so CAN involve many partners/stakeholders although it does recognise that often it is the program staff who are ultimately responsible. Our program is working at 3 levels, with farmers, with government extension and with local community groups. Are there any suggestions on getting meaningful participation in this process from the BPs? We had originally intended on their representation in this initial workshop however I am wary of this. Are there any recommendations for, or against their being involved in this initial w/s or any suggestions for pre/post activities that can draw buy-in and understanding the process leading to their effective involvement in later assessing project successes (or otherwise!). Is there any merit to having the BPs involved in some stages of the w/s and not involved in the more internal/operational sections??

Thanks for any guidance here!

Responses were received, with many thanks, from:

- 99. [Terry Smutylo](#), Canada (2 contributions)
- 100. [Fred Carden](#), Canada
- 101. [Huong Tranthilan](#), Vietnam (2 contributions)
- 102. [Ziad Moussa](#), Lebanon
- 103. [Jan Van Ongevalle](#), Zimbabwe
- 104. [Julius Nyangaga](#), Kenya
- 105. [Ben Ramalingam](#), UK
- 106. [Murray E. Millar](#), Australia
- 107. [Sharyn Davis](#), Cambodia (2 contributions)
- 108. [Ricardo Wilson-Grau](#), Netherlands
- 109. [Javier Pacheco Arrieta](#), Colombia



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Summary of Responses:

127. [Terry Smutyllo](#) offered his thoughts on various questions Sharyn had asked. To ensure that workshop participants got an effective understanding of the terminology without getting ‘hung up’ on it, Terry argued that it is important to get the terminology correct and standardised in order to clarify the underlying ideas. This could be helped by the workshop facilitator working with colleagues fluent in both languages for a few days before the event to develop a glossary. Terry suggested that it would only be worthwhile for boundary partners to participate in the initial workshop if the programme staff had their thinking on OM already well clarified. If they do not, it may be best to hold separate, sequential sessions. To foster boundary partner understanding and ‘buy-in’, it could be helpful to present a prepared “fairly well-articulated OM package”, as a starting point for discussions and to aid understanding, although for other boundary partners it may be best to only focus on the progress markers. Finally, Terry urged Sharyn to try to have all boundary participants engaged in the same sessions, to foster a shared understanding.
128. [Fred Carden](#) shared his experiences of facilitating similar workshops in Cambodia and Vietnam, and mentioned that his team had also considered undertaking the difficult task of translating the OM manual into Khmer. He echoed Terry’s point that it is best to involve boundary partners once the project team have a decent understanding and commitment to the methodology. In a project in India, they had a successful session with the boundary partners in a nearby village. The key to this success was that they prepared by having a mock visit, with different team members playing various roles of villagers etc.
129. [Huong Tran](#) said that Sharyn’s concerns are very much relevant in Vietnam where she is based, and she offered advice based on her personal experience. Firstly, the issues related to introducing the new terminology caused difficulties. The problem was that many people were still getting used to the terms in the Logical Framework Approach (LFA), so Huong Tran produced a simple table comparing elements of the LFA with OM terms (<http://www.outcomemapping.ca/resource/resource.php?id=106>). She recommended that Sharyn simplify OM terminologies by referring to the most commonly accepted and understandable Khmer development terms. In response to the question about boundary partners’ involvement, she suggested that Sharyn carefully choose boundary partners as those organisations with whom they work directly, as this will simplify matters and make it easier to involve all of them in the OM workshop.
130. [Ziad Moussa](#) added that he was finding this exchange very useful, as he is currently working to “Arabize” OM for the Middle East and North Africa context, and noted that he was anticipating many similar issues and difficulties.
131. While [Jan Van Ongevalle](#) did include important boundary partners in his first OM workshop in Zimbabwe, he highly recommended holding a brainstorming session beforehand to ensure that the project coordinating team could understand the new methodology in relation to their context. Also, explaining OM methodology was hugely helped by immediately relating new terms to the specific context people are working in, as this helps ground their understanding of the approach. Finally, he said that it is important to tailor your approach to your context, as shown by his organisation’s experience where 3 workshops were required



to fully prepare their OM framework.

132. [Julius Nyangaga](#) agreed that terminology can be a problem even for those who have a strong command of English. His experience echoes Hounq Tran's, the researchers he worked with merged OM concepts with LFAs to help unpack the terms.
133. [Hounq Tran](#) sent her table, [Ben](#) added it to the resource library (<http://www.outcomemapping.ca/resource/resource.php?id=106>).
134. [Murray Millar](#) expressed his worry that spending too much time drawing comparisons between OM and LFA runs the risk of losing the power of OM. OM operates with a different type of logic from LFA: whereas LFA is based on instrumental, mechanistic, technical, means-end reason, OM is based on a practical, communicative form of reason. OM is more powerful than LFAs because it takes into account the complexity of influence and social change, and allows a more complex and responsive strategy to be taken.
135. [Terry](#) agreed that “a straight, linear transposition of OM terms into log frame language loses the insight that OM offers”, however it is often necessary to make some comparisons given the ubiquitous nature of the log frame. He urged the community to review and revise the table posted by Hounq Tran in the resource library (<http://www.outcomemapping.ca/resource/resource.php?id=106>).
136. [Sharyn](#) thanked members for their responses.
137. [Ricardo Wilson-Grau](#) congratulated Tran Thi Lan Huong for her attempts to make comparisons between LFA and OM, but also agreed with Murray Millar that it would be unwise to attempt to harmonise these two fundamentally incompatible approaches. He shared two problems he saw with this: firstly, he argued that Outcome Challenges and Progress Markers do not correspond to LFA's “outputs” and “activities”, because the latter pair are under the direct control of an organisation, whereas the former pair are beyond an organisation's control, and only under its *influence*. Secondly, he argued that the more fundamental problem is that while the nature of LFA logic makes it a suitable framework for taking on tasks comparable to building a bridge or a school, in which results and influences are known, “social change occurs in complex, open and dynamic situations where results are unpredictable and uncontrollable”. He recommended two books which contain discussions of the implications of the complexity of social change to evaluation: “Getting to Maybe: How the World is Changed” co-authored by Michael Quinn Patton, and “Systems Conceptions in Evaluation – An Expert Anthology” edited by Bob Williams. He also recommended the American Evaluation Association's listserv for systems and evaluation <http://evaluation.wmich.edu/archives/eval-sys.html>.
138. [Sharyn](#) thanked members for their contributions again. She said that she will be paying specific attention to ensuring that people have a good grasp of OM terminology in local language, and felt that in her situation it would be best if she did not introduce OM terms in comparison with the LFA. She said that she would be taking Terry's suggestion of preparing an OM framework in advance to present to the boundary partners as a starting point, due to time constraints.
139. [Javier Pacheco Arrieta](#) recommended using visual aids to help bridge the culture and language barriers. In particular, building a graphic with elements familiar to the community



(based on your knowledge of the context) will help bring an understanding of OM concepts.

Concluding remarks and actions to take forward:

- For situations involving a language barrier and/or cultural divides, it is important to prepare thoroughly in advance, for example by preparing a glossary of terms, securely grounding your own team's understanding before involving others, or by holding role-plays to prepare your team for fostering local involvement.
- Explanations can be helped by using the most basic development terms in the local tongue, and by applying new terms to the local context as soon as possible.
- In some situations it may be beneficial to introduce OM concepts by referring to similar parts of the LFA, however caution must be taken as the LFA operates on a different development paradigm.
- There is a need to carefully consider which stage to involve of boundary partners in workshops. It may be best to wait until your own organisation has a decent understanding of the concepts, to prepare an OM framework in advance to use as a starting point for the workshop, or to hold separate workshops for key BPs, although where possible they should be involved as soon as possible.



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