

Centre for International Development - Department of Economics, University of Bologna,
*Summer School on Monitoring and Evaluation
of International Development Programs*

Outcome Mapping module

15-17 June 2016

Instructor and Facilitator: Terry Smutylo

Purpose: This module introduces the Outcome Mapping approach to defining and tracking program results. It provides workshop participants with opportunities to discuss, apply and assess Outcome Mapping concepts and tools in situations or projects drawn from their own working experience.

Expected Result: Participants will have sufficient knowledge and skill to introduce Outcome Mapping in their own work environments and to apply its tools where appropriate.

Overview: Outcome mapping (OM) is a framework used in planning, monitoring and evaluating development and humanitarian interventions. It was originally developed by the International Development Research Centre (IDRC) to help evaluate the outcomes of its applied research granting programs and is now widely used by governmental, multilateral and non-governmental organizations for a wide range of purposes. It is particularly useful for planning and documenting the social transformations on which sustainable ecological, economic, social and technological change depend. Unlike approaches for measuring outputs (What did the project produce?) and impacts (How have we changed a population's well-being?), OM includes documenting and understanding changes in the behaviors of the people and organizations influenced by the intervention.

OM sees both intended and unanticipated outcomes as important to document. Making human behavior the central focus, it connects 'outputs' to 'outcomes' by focusing on the patterns of action and interaction among stakeholders. OM defines outcomes as changes in these patterns as influenced by an intervention. Faced with a complex web of roles, responsibilities, mandates and motivations, intervening organizations can use the actor-focused OM tools to identify the interrelationships and actions upon which its mission depends. This actors-in-context approach supports the implementation and management of contextually-relevant strategies while building understanding of the system in which the work is being carried out. During this three day workshop we will work through the seven Outcome Mapping steps in the intentional design framework to answer these questions:

1. Ideally, what should the world be like in your sphere of interest? (Vision)
2. Who are or could be significant actors in that ideal world? (Vision & Mission)
3. Which of those actors' roles could you influence? (Boundary Partners)
4. In what directions would you like to influence them? (Outcome Challenge)
5. How could you try to influence the significant actors? (Strategy Map)
6. What would progress look like? (Progress Markers)
7. How will you stay competent, viable & credible in delivering your programs? (Organizational Practices)

Methodology: The course methodology demonstrates the participatory values at the core of Outcome Mapping, combining presentations on theory and case studies with group discussion, individual reflection, small group practice and feedback sessions. Participants will apply OM tools and concepts, in facilitated, practical exercises, to situations from their own work experience. Course materials include: a training manual containing reference articles, exercises, slides and a glossary of OM terminology in four languages (English, French, Arabic and Spanish). References will include the book, 'Outcome Mapping: Building Learning and Reflection in to Development Programs' by S. Earl, F. Carden and T. Smutylo;

‘Exploring the Science of Complexity: Ideas and Implications for Development and Humanitarian Efforts’ by Ben Ramalingam et al. ODI Working Paper 285; and ‘What is Impact?’ by Hearn, S. and Buffardi, A.L. (2016) Overseas Development Institute, London.

Facilitator: Terry Smutylo created IDRC’s Evaluation Unit in 1992 and served as its Director until 2005. Since then, he has worked as a Special Advisor to IDRC, on the faculty of IPDET, as an Outcome Mapping facilitator, and as an independent evaluation facilitator with international research and development organizations. He specializes in methods which empower stakeholders, promote learning and focus on outcomes in project, program and strategic evaluations. While with the IDRC, he led teams that developed several internationally recognized methodologies, including Organizational Self-Assessment and Outcome Mapping. He has worked with development and humanitarian organizations in Canada, the United States, Europe, Asia, Africa, Australasia and Latin America, conducting evaluations, providing training, and facilitating organizational development. He holds a Master’s degree in African studies from the University of Ghana and an undergraduate degree in sociology from the University of Toronto. Email: tsmutylo@magma.ca.

Introduction to Outcome Mapping (OM) Workshop program 15 - 17 June 2016		
Sessions	Objectives	Background Reading and Reference Materials
Day 1: Morning		
Introductions, agenda & workshop process	Participants become comfortable with each other and with the workshop agenda	Sam Kaner et al. <i>“Facilitator’s Guide to Participatory Decision Making”</i> Jossey-Bass, 2007
Identifying characteristics of useful planning, monitoring & evaluation (PME)	Surface and synthesize needs & concerns in existing PME practices	‘What is Impact?’ by Hearn, S. and Buffardi, A.L. (2016) Overseas Development Institute, London.
Introduce some complexity concepts & their implications for PME	Define concepts, put Outcome Mapping in its historical and methodological context	Ben Ramalingam and Harry Jones, <i>“Exploring the science of complexity: Ideas and implications...”</i> ODI Working Paper 285, 2008
Formation of Case Study Working Groups	Present, discuss and select relevant projects for applying OM in breakout sessions	
Exercise: Applying systems thinking to case studies	Build skill & confidence in applying systems concepts to complex situations	Bob Williams and William Hummelbrunner, <i>“Systems Concepts in Action”</i> Stanford University Press, 2009
Lunch		
Overview of Key OM concepts	Grasp and assess basic OM concepts, values and assumptions	Resources at: outcomemapping.ca
OM Steps 1 & 2: Vision & Mission	Understand and practice applying the OM concepts of ‘vision’ & ‘mission’	Sarah Earl, Fred Carden and Terry Smutylo, <i>“Outcome Mapping Building Learning and Reflection into Development Programs”</i> , IDRC, 2001
OM Step 3: Boundary Partners	Understand and apply concepts of ‘boundaries’ and ‘boundary work’	Peter P. Molinga, <i>“Boundary Work and the Complexity of Natural Resources Management”</i> , Crop Science, Vol 50, 2010
Evaluation of Day I	Obtain feedback to improve next day’s sessions	

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Day 2: Morning		
Review of Day 1	Modify agenda as needed Review of & clarifications from previous day's work	
OM Step 4: Outcome Challenge	Understand the 'Outcome Challenge' concept and apply it to the case studies	
OM Step 5: Progress Markers	Understand 'Progress Markers' concept and apply it to case studies	
Lunch		
OM Step 6: Strategy Maps	Understand the 'Strategy Map' framework and apply it to case studies	
Working Group Presentations & Discussions	Share feedback and learnings across breakout groups	
Evaluation of Day 2	Obtain feedback to improve next day's sessions	
Day 3: Morning		
Review of Day 2	Modify agenda as needed by feedback Review of & clarifications from previous day's work	
OM Step 7: Organizational Practices	Understand and begin applying Step 7 Reflect on participants' organizational needs & exchange learnings	
Exercise on using single elements of OM	Develop confidence and flexibility in applying OM	Richard Smith et al. <i>Ten years of Outcome Mapping: Adaptations and Support</i> , OM Ideas No. 4, June 2012
Lunch		
Ways of using OM: examples from practice	Overview of journals and reflective questions Illustrate range of adaptations necessary for applying OM in PME	Kaia Ambrose and Daniel Roduner, " A conceptual fusion of the logical framework approach and outcome mapping ", Agridea, OMLC, 2009
Closing comments on applying OM	Address outstanding questions Review of concepts & guiding principles	
Critical Assessment of OM	Pros, cons and cautions in using OM Rating OM against needs and concerns identified on Day 1	
Introducing OM in your own work context	Practice addressing potential responses to OM in participants' working environments	
Evaluation of the OM workshop	Obtain feedback for next sessions and for subsequent CID training courses	
Closing		