



## WEBINAR TRANSCRIPT: COMPLEXITY AWARE MONITORING (CAM) WORKSHOP SERIES

### SESSION 1: INTRODUCTION TO CAM

Emily Stammer (00:00:55)

Thanks for taking the time to be here today. My name is Emily Stammer. I'm an M&E advisor with the MOMENTUM Knowledge Accelerator, also called MKA. I'd like to welcome you all to the first session of the MOMENTUM Complexity Aware Monitoring Workshop. Next slide. So today I'd like to start by giving you a quick overview of the workshop format. Today is going to be an introductory session. We're going to give an overview of CAM. Next week, we'll talk a little bit more about preparing for CAM, CAM approaches. And then the next three sessions will be method specific, so we'll do more of a deep dive into pause and reflect, most significant change and outcome harvesting. We're really hoping for the sessions to be as interactive as possible. The first few sessions will be a bit more didactic in nature, but we've set aside time in each session for some discussion and questions throughout. So, be ready to use your chat box and please engage as we go.

Emily Stammer (00:02:16)

Each session will provide an overview to the method or a set of methods and then we'll have some presentations from CAM practitioners, in many cases from within the MOMENTUM awards themselves, with work done either internally or externally. So now I want to talk a little bit about housekeeping, a few things. Please stay on mute when you're not speaking. We're also going to try and conserve bandwidth. We have quite a few people who RSVP'd to these sessions so we'll ask that only the presenters have their cameras on, if they'd like, but in the breakout sessions, when we have those a little bit later, if you'd like to turn on your camera, please feel free. Those will be smaller groups and it'll be nice to engage with your fellow group members that way.

Emily Stammer (00:03:11)

We have set aside a number of times within the presentation to answer questions, so feel free to ask questions during those times, but if you have questions as we go, please put them in the chat box and we'll try and answer those as we go as well. We are recording the session today, so please note that if you do not want to be recorded, it might be time to log off of the Zoom.

Emily Stammer (00:03:42)

We will be recording these sessions, like I said, and we'll be making them available on the MOMENTUM KM hub. If you are external to the MOMENTUM suite of awards, we're looking into making the materials

available externally, and we'll talk more on that to come later. We have to still kind of work out some kinks there. If at any point you're having any issues with audio or visual issues, please enter your question into the chat and we have someone on hand, Devon Bell, who will be assisting with those issues. We'll also be using a software called RiseUp Pad throughout the presentation. We'll put those links in the chat. It's a nice software we use to ask questions and encourage engagement. You just open your browser, type into it, and your responses are anonymous, but it's a great way for us to ask questions and we'll use it a bit later on in this session. Next slide.

Emily Stammer (00:04:56)

So I want to talk a little bit quickly about the workshop objectives. So, like I said, it's a series of five workshops that'll be held on a weekly basis. What we're really hoping for with these workshops is to improve the participants' knowledge and understanding of complexity-aware monitoring approaches, your ability to use these approaches and to also expand your networks of CAM practitioners within and outside of the MOMENTUM suite of awards. We'll talk a little bit more about these in next week's session when we talk about M&E of the workshop itself, but this is just an overview of what we're hoping you get out of the sessions.

Emily Stammer (00:05:35)

We'll also be practicing CAM approaches within the workshop itself. So today we'll be doing a little bit of pause and reflect, so you should get a little bit of practice just by participating in the session. Next slide. For today specifically, we're hoping to introduce you all to the concept of complexity-aware monitoring. We'll discuss the added value of using CAM approaches and the intersection between CAM traditional M&E approaches and adaptive learning. And we'll give a short overview of a number of CAM approaches discussing their applicability and how to choose the right method to fit your purpose. Next slide.

Emily Stammer (00:06:21)

I also just want to note that this session, but also the workshop series in general, is really based on a complexity-aware monitoring guide that MKA put together earlier this year. There's a link to the guide here but please feel free to check it out. It provides a lot more detail and is a useful resource as we go through the workshop. Next slide. So now I'd like to give a brief introduction to our presenters. We've got Barbara Rawlins who's a Senior Implementation Research Advisor with the USAID Bureau for Global Health. Lucy Wilson who's a Complexity-Aware Monitoring Consultant working with MOMENTUM Knowledge Accelerator. Lara Vaz is our Senior Learning Director with MKA and Mahua Mandal is a Senior M&E Technical Advisor with MKA. Next slide.

Emily Stammer (00:07:21)

So a little bit about today's session, we're going to start with Barbara Rawlins who will speak about CAM's relevance to the MOMENTUM Awards. We will then hand it over to Lucy Wilson who will give an overview of CAM and some of the selected approaches. At that point, we will take a quick four minute break between parts two and three just to stretch, refill your coffee. We'll pick up with Lara Vaz, who will be speaking about integration of CAM with M&E and adaptive learning efforts, followed by Mahua Mandal who will talk about her experience working with ripple effect mapping. We'll wrap up with a pause and reflect session, looking back at today's session and yeah, that's the agenda for today. So at this point, I'd like to turn it over to Barbara Rawlins of USAID. She'll give a quick overview of CAM and talk about CAM's relevance to the MOMENTUM suite of awards, Barbara.

Barbara Rawlins (00:08:38)

Thanks Emily. Okay, next slide please. Hello everyone. So I'd like to start out by talking about what is complexity-aware monitoring? So USAID defines complexity-aware monitoring as a type of complementary monitoring that is useful when results are difficult to predict due to dynamic context or unclear cause and effect relationships. And we see it as complementing traditional types of performance monitoring and context monitoring. Next slide please. So USAID's interest in complexity-aware monitoring dates back to at least 2013 when the Bureau for Policy Planning and Learning, Office of Learning Evaluation and Research, put out a discussion note about complexity-aware monitoring. And this note highlighted five different complexity-aware monitoring approaches and really launched a period of experimentation and support for applying these methods to USAID programming contexts. The original paper mentioned five methods. Some of those will be discussed later today as part of this session. And the paper was then updated in 2018 and currently describes when to use CAM's different guiding principles, the different approaches, etc. And we recognize that there's still much to learn about when and how to apply these approaches. Next slide please.

Barbara Rawlins (00:10:23)

So when to use CAM, so CAM is appropriate for projects or activities under a number of different conditions. First of all, when cause and effect relationships are not clear, when stakeholders bring diverse perspectives to the situation, when contextual factors are likely to influence programming, which is most of the time, when new opportunities or new needs arise and when the pace of change is unpredictable. Next slide please. So a few of the guiding principles around the application of CAM include attending to performance monitoring's three blind spots such as being able to determine and measure unintended outcomes, alternative causes or changes that are not linear in nature, synchronizing monitoring with the pace of change and consider interrelationships perspectives and boundaries. Next slide please.

Barbara Rawlins (00:11:32)

So CAM fits well within USAID's approach and focus on collaborating, learning, and adapting and USAID is increasingly recognizing the importance of adaptability for programming to be effective and the value of iterative learning. Next slide please. So why should MOMENTUM use CAM? Well, MOMENTUM is a complex set of awards and we really feel that traditional monitoring and evaluation approaches alone are not going to be able to convey the project achievements and really generate some of the iterative learning needed to drive program adaptations and policy action. And we think CAM is really well suited to provide some of the newer cutting edge solutions that will really help to monitor the project in the complex aspects or projects rather. So next slide please.

Barbara Rawlins (00:12:46)

So how specifically can CAM be used by MOMENTUM? We think there are a number of different ways that it can be applied. It can help to answer some of the MOMENTUM-wide learning questions. We think it can generate iterative learning to help inform adaptive management of programs at the country level. It can complement performance and context monitoring, as I mentioned earlier, to help tell the MOMENTUM story as well as a number of other ways. Next slide please. So now I'd like to turn it over to Lucy Wilson with MKA who will give a more in-depth overview of CAM and some of the different CAM approaches. Thank you.

Lucy Wilson (00:13:37)

Thanks Barbara and Emily, I'm excited to be with you all today to talk about complexity-aware monitoring. I've been implementing complexity-aware monitoring approaches since before I'd actually even heard the term. In my first job as an M&E officer on a USAID funded project I was trained to use outcome harvesting, except that no one ever called it outcome harvesting. It wasn't until about seven years later that I came across a description of outcome harvesting and was like, "Wow, this is what I've been doing this entire time." There was a name for it and it was an official thing that other people did. I was astounded. And from there, it leaped into the world of complexity-aware monitoring approaches and began learning about them and using other approaches. Next slide.

Lucy Wilson (00:14:22)

So before we jump into it, I'm going to go over a little bit of terminology because as we M&E geeks know, different people use different terms to mean different things, in different contexts. These are all in the glossary of the CAM guide that Emily mentioned earlier. And note when I'm saying CAM, it's CAM not KM, even though they are closely related, but note that not everyone in this workshop in this series would use these terms consistently, but we do all try to explain the terms that we use for clarity. So I try to use the term causal framework as a catch-all for theories of change, logic models, log frames, etc. Anything work that describes how a project, what it does is supposed to create change to what its goals are. I try to use causal framework. Projects are awards like MKA, MCGL or MRITE. Interventions are the smaller level

activities, like say a workshop on CAM methods or a work stream intended to institutionalize use of Sayana Press in Burundi, might be an intervention.

Lucy Wilson (00:15:30)

In terms of outputs, outcomes and impact, outputs to me are something you can control. Outcomes are things that you can influence, but not necessarily control and impact is the longer term objectives that you hope to affect. Clients are those that your project intends to serve or benefit, while the participants are those who are actively engaged in your M&E and stakeholders is the broadest group of people in organizations with which your project interacts, affects or is affected by. Finally systems is the broad set of ever-changing stakeholders, their diverse perspectives, their interrelationships who are all working together towards the same goal. Systems thinking is this taking that broad system into consideration when implementing. When people talk about how systems in the WHO building blocks, that's a system. But systems thinking often goes even a little broader to think about the community that it serves and the interactions between the various aspects of the system.

Lucy Wilson (00:16:27)

I also use the term context to refer to things happening in the broader system. Next. So what is complexity-aware monitoring and when should it be used? We're going to jump into that first by asking you all next a question. What do you think when you hear complexity-aware monitoring? And this is where I want to ask you all to use the link that's in the chat, click on that, or put it into your browser, open up the browser screen, and you can write in your answer to the question and Sammy can switch over and share the responses on the RiseUp Pad now. Again, the question I'd like to see your responses on is, what do you think of when you hear complexity-aware monitoring? And this could be, do you think it's somewhat synonymous with something else that you do? Do you have a particular reaction to the term that you can describe? Does it make you feel excited or frustrated or bored or is there a particular approach that comes to mind when you think of complexity-aware monitoring?

Lucy Wilson (00:17:38)

So I see lots of great responses coming in. Yeah, more qualitative, richer contextualized. That's true. I think though it often can be quantitative and one of the things that I found is, one time when I described it as qualitative M&E somebody responded, "Oh, you must just do KIIs and focus group discussions, and lots of InVivo," and that's not necessarily the same thing. It's not necessarily qualitative research. Some questions about rigor. True, we'll talk a little bit more about that in next session. It is a different approach with different purposes. Let's see, plan as you go. I think that's an interesting one because it can be about how you adapt your approach as you work your way through it.

Lucy Wilson (00:18:31)

Monitoring and learning that takes into account many aspects of the project's environment is absolutely right. Reflecting the complex environment, addressing the reality of implementation and context is great, as opposed to assuming we are conducting scientific experiments. Absolutely. And then yes, checking whether assumptions of the theory of change are holding out and why not. There's a big focus on theories of change there again, as I say, causal frameworks, so that's a great point. Thanks. And you all can continue to add your comments in. It'll be interesting for us to see what you all are thinking about because that'll help us as we frame the sessions going forward. Okay so, let's move on to the defining complexity.

Lucy Wilson (00:19:26)

Thanks. So people always want to know what counts as complex, is what I am doing complex. I've never thought of it as complex before, I've been doing it for years. Here is one way to think of and define complexity with thanks to Michael Quinn Patton. As the figure shows complexity is a continuum between simple and chaotic. It occurs when there's a lack of both strong expertise or certainty and of agreement on what needs to be done. Its situation can be complex as a result of the intervention, the context or both. And so I asked you all these two questions, are you implementing a simple, straightforward intervention in a stable well-defined environment? And do you expect your work plan to be implemented as originally written without any delays or changes? You can answer this just in the chat if you want.

Lucy Wilson (00:20:18)

And I would expect most of you to say no. If your responses are no, you're probably working in a complex environment, but if you're thinking yes, I would answer yes to these questions, you don't necessarily have to sign off the zoom. Many CAM approaches can also be useful for interventions that fall within the simpler end of the complexity continuum. Next slide. So a little bit more about socially-complicated, with USAID projects in particular, there is certainly social complications. People, ideas, and resources from one country, the United States, are trying to come together with people, resources and ideas from other countries to fill gaps. And within a country, people, ideas and resources from one group, say urban professionals, government officials, or healthcare administrators, are trying to create change with other groups of people and their resources and ideas such as farmers, mothers, nurses, doctors, religious leaders. So if you're holding a stakeholder engagement meeting, you're probably doing that to try to overcome some of the inherent social complications in your work. Next.

Lucy Wilson (00:21:23)

So you all have probably seen a version of this image before, right? The idea that reality, it's not as neat as planned. Do you feel like it describes your work? Do you have good days and bad days, days when the data goes in the right direction and then days when the data does not make any sense at all? That's usually technically-complicated. Next. So now that we've defined complexity, what is complexity-aware monitoring? Now, the definition here is what MOMENTUM is using to refer to CAM. It's slightly different

from the definition that Barbara gave a few minutes ago, USAID's definition. They both have a slightly different word choice, but they essentially mean the same things. They both work. And note that while we say monitoring, many CAM approaches can be used in or for evaluations and almost all of them integrate farming into their approach. Next.

Lucy Wilson (00:22:14)

So a few minutes ago Barbara also talked about scenarios where CAM approaches might be useful. This slide has a similar list of scenarios, but before I talk through them, are there situations or interventions in your projects that you're already thinking might be well suited for CAM approaches?

Lucy Wilson (00:22:29)

And if so, can you add those to the chat? It'd be interesting to see what you all are planning. So, these situations here are both situations in which complexity can occur and examples of situations in which CAM approaches might be particularly useful. For instance, when innovative practices are being designed, implemented and tested, this may lead to unintended yet important outcomes. In situations where causal pathways between intervention and intended outcome are not clear, determining contribution can be difficult. Then when implementing interventions, which aim to change the beliefs and behaviors of individuals or social groups such as social norm change interventions, it is important to understand how the stakeholders perceive the interventions. There are also situations in which we might need an intermediate outcome or better understanding of the context. Next.

Lucy Wilson (00:23:21)

Okay, before I move on, let's stop in and see, are there any burning questions about complexity and complexity-aware monitoring? The chat looks pretty quiet so far, but does anybody have any questions? Okay, next slide.

Lucy Wilson (00:23:42)

So the missing and difficult questions, the situations that I described on the previous slide are challenging and traditional performance M&E may leave unanswered questions. So complexity-aware monitoring approaches help to answer several key questions that those scenarios raised. We're going to look at each of these questions over the next couple of slides. Next. First up, what outcomes might be missing? Again, I'm going to see if I can't get any chatter on the chat here. Does anyone have an example of an important unintended outcome that they saw in a program? It was not picked up by the traditional M&E but discovered anyway? Got a quiet group this morning. Okay, maybe something will come up later that we can talk about. So let's talk about on the next slide, what it might look like to capture unintended outcomes using complexity-aware monitoring. You could use the most significant change approach for a

capacity building workshop like this one and we will. We'll follow up in six or nine months from now, and if already you all are using CAM approaches and seeing positive-

Lucy Wilson (00:25:00)

If already you all are using CAM approaches and seeing positive changes to your project, this may have happened faster and more completely than we expect it to be possible. So, awesome. That would be unintended. Meanwhile, someone else may say that the most significant change that happened to them as a result of this workshop is that, they met a colleague during a breakout session, ended up collaborating with that colleague, not on CAM, but on say data visualization. Okay, great. That wasn't what we were going for, but the networking aspect was useful. So, good. As with most significant change, ripple effects mapping is a great approach for learning about unintended or missing outcomes. And more who we'll be talking more about that later in this section. Next.

Lucy Wilson (00:25:42)

So the next question is, what outcomes might be yet to emerge? Some of the things that we're aiming to accomplish, take a long time. Like policy change, scale-up, design and rigorous testing of a new intervention. You'll be lucky to see those outcomes occur within the time period of your project. So, has anyone worked towards an outcome change that's span over multiple project cycles? It took four or five or more years to achieve? Again, if you are brave, you can add that to the chat and we'd curious to see what those experiences are. So, there are several CAM approaches that can help measure progress along the way. Next.

Lucy Wilson (00:26:23)

So, outcome mapping is a great approach for outcomes that are slow to emerge. The map is like a causal framework or theory of change, that is fleshed out and elaborated on with progress markers. Kind of like indicators, but that are markers of progress towards the outcome. They come together to tell a bigger story. They can be useful for interventions like scale-up or other large interventions working across the health system. The Outcome app also helps to manage expectations with the donor. Then, there's causal link monitoring, which flushes out or elaborates on a causal framework as well. The causal links are the things that need to happen to go from outputs to outcomes and from outcomes to impact. So, in addition to monitoring the outputs outcomes and impacts, you also monitor those immediate steps, at least for a short period of time. For instance, our stakeholders reviewing, discussing and using the data that you project provided to them, even if they haven't yet enacted change based on the data. This can also be helpful to know if you're even sharing your data with the right stakeholders. Next.

Lucy Wilson (00:27:26)



So the next question is, how do stakeholders perceive the intervention? Again, stakeholders is broad. Staff, clients, funders, partners. What do they think about what's happening? This is also called stakeholder feedback and some have called it the third leg of M and E or the fourth or the fifth, depending what's in your M and E acronym. I think stakeholder feedback is particularly important for these last three reasons here. Understanding contributions, triangulation of findings and engagement of marginalized populations. Next. So, what are some examples of stakeholder perspective engagement in use? I mentioned most significant change earlier. It's a great approach for getting stakeholder feedback. It's especially interesting to ask a wide variety of stakeholders what happened as a result of the intervention. And then, there's positive reflect, which is an adaptive learning approach and a CAM approach in which stakeholders are asked to reflect on what has happened thus far and to recommend improvements. So, midterm stakeholder engagement meetings are a great example of using pause and reflect for stakeholder feedback.

Lucy Wilson (00:28:32)

Next. The fourth question is, what factors contributed to observed outcomes? So, I've mentioned in contribution a few times today. Most of you all probably know the difference between contribution and attribution, but I'm going to go over it quickly. So, we can attribute a change or an observed outcome to a project, if we can say for certain that the change would not have happened without the project. The changes attributable to the project. We measure attribution through experimental design evaluations and research. But where these are not possible, we can at least use complexity room monitoring to understand contribution. That is the project influenced with instrumental and a change happening, but it wasn't necessarily the only factor. We don't know for certain what would have happened without the project or intervention. We can't measure that. So, contribution is not necessarily as rigorous as attribution, but it has its positives, including that the focus is not only on the project individually, but the partners and collaborations that work towards the change. Next.

Lucy Wilson (00:29:36)

So looking for some examples of CAM approaches, contribution analysis uses the project's causal framework and targeted data collection to understand the change process. So just understanding what happened, that led to a new policy being approved by the minister of health. Outcome harvesting builds on a contribution analysis, but it starts with the process of identifying changes that may have happened as a result of the project. So, if there are multiple groups working on COVID-19 mitigation within MNCH services, outcome harvesting starts with identifying what the changes or outcomes are, and then tracing back to those specific interventions that likely contributed towards them occurring. Sometimes, this is based on a key stakeholder stating that the project was a key factor in the change, such as several hospital administrators or healthcare providers that can credit to the project. So, we'd also want to see a connection through the causal framework or transcend data, et cetera. Next.

Lucy Wilson (00:30:33)

So, the last missing or difficult question that CAM approaches can help to answer is, what is happening in the wider context? Remember this image from before when we talked about technically complicated? Part of what makes it complicated is that, there are things happening elsewhere in the system or contextual factors that are contributing to those swings. What types of things affect your project, but are out of your control? Say a pandemic and election, a new minister of health being named, activities implemented by other organizations or more local contextual factors, such as a really strong district health supervisor who's over here, but a facility with weak supervision over there. Understanding these things helps to understand the, why a project is succeeding or not. Next.

Lucy Wilson (00:31:19)

So, social network analysis is a great approach and can be used in many ways, for many purposes. It helps you understand who your stakeholders are, how they interact with each other, how does information flow, who has influence? And if repeated over time, how have those relationships changed?

Lucy Wilson (00:31:36)

Are you closer to your intended goal? Sentinel indicators are another CAM approach that looks at context. These are often like proxy indicators and signal to the project that additional analysis is needed. So, Sentinel indicators could be useful to support collaboration across the momentum suite. For instance, momentum projects could track reports of Iatrogenic fistula, is an indicator of need for improved cesarean section skills. Next.

Lucy Wilson (00:32:06)

So, wrapping up. So, complexity where monitoring helps to answer valuable questions about intended and unintended outcomes and unfinished outcomes. It answers questions about the factors that contributed to change, about the stakeholders and their perspectives and perceptions and then the context and how it influences the project. It also uses M and E to relate, learn and adapt your programs, as well as to learn and adapt your M and E systems. So, we'll hear a little bit more about that from Lara in a few minutes, and again, in subsequent sessions. In the meantime, any questions? Let's look at what's going on in the chat. I did see that there are some examples of, going to scale that has taken a really long time at 20 plus year journey under the saving newborn's life project. And then, issuing grants to several smaller organizations that may be consecutive and complimentary. So, yes. That definitely makes for a complex environment that can take a long time. And then, as far as things that are out of your control, absolutely political instability, COVID-19, these are all great things, as well as priorities.

Lucy Wilson (00:33:30)

How do priorities of funders and local government and other actors interact with your project? That's a great point. And yes, and elections are one that we see a lot. Any other questions that people have before I move on? Okay. We'll move on. But yeah, that's a great point that, bad outcomes in projects can really temper the way the community reacts to future projects. That's a great point. Some of these... So we have a comment here, we in a manner trying to reflect complex numeral monitoring, while reporting by encouraging our partners and us to report how we are contributing to the bigger picture. Yeah. The bigger picture thinking is a great point. That's the thing that would be great to explore more. Okay. I think we'll move on to the next slide.

Lucy Wilson (00:34:31)

What are some other CAM approaches? So, I plan to go through this next set of slides really quickly, as I've already introduced you to the approaches in the last couple of slides. There are nine approaches that are included in these sides and thus in the CAM guide that Emily shared earlier. If we've peaked your interest on any of them, you can refer to the slides or the guide to learn more. And then from the guide, there are links to case studies and reference documents that describe how to implement the approaches. Next. So on each of these slides, there's a bullet at the bottom called GREAT FOR, which is not exhaustive, but illustrative of the type of activities that the approach can be used for. So for instance, for social network analysis, that is often great for anything that involves lots of stakeholders. Next.

Lucy Wilson (00:35:21)

In Causal Link Monitoring, this is the approach where we look at the links between outputs and outcomes and outcomes that impacts. This is great for innovative projects and ones in which there's uncertainty about stakeholders, how stakeholders will respond. Next. Outcome Mapping also flushes out a causal framework with progress markers. It's visionary, it's participatory, it's great for research, scale-up, capacity building. Next. Sentinel indicators. Note that, this is one that can really be either qualitative or quantitative. I've mentioned Iatrogenic fistulas earlier, but another classic example is a drug stock-outs. These are also often used in fragile settings. Next.

Lucy Wilson (00:36:02)

Pause and Reflect is great for everything and there are so many ways to do it. We'll be showing you several approaches over the course of this workshop series, starting with after action review today. Next. Outcome harvesting is a great one. It's sometimes referred to as forensic M and E, as you get to be a detective, sleuthing about for outcomes to capture. Doesn't that sounds like fun? And then Most Significant Change on the next slide. This one, I mentioned a few times earlier. It's great for things with diverse stakeholders. It's commonly used in complete in community-based interventions, like social norm change, but can be used in a variety of different types interventions. Next.

Lucy Wilson (00:36:45)

And then, Ripple Effects Mapping. We'll hear about some of who shortly, so stay tuned on that one. And our last approach is, Contribution Analysis, which is a structured approach to better understand the factors that led to an observed outcome. And it relies heavily on having a strong evidence-based causal framework. And as a teaser for next week's session, we'll be talking a lot more about causal frameworks and in particular how to develop strong theories of change. Next.

Lucy Wilson (00:37:13)

Voila, that's nine out of over a 100 approaches for complexity where monitoring and adaptive learning that a USAID funded review found. So, if there are others that you've used and we haven't talked about today, again, I'd love to see those examples in the chat. So, if you know of other approaches, please share them. Particularly if you've used them before. We chose these nine approaches to highlight, as we feel they may be particularly suitable and feasible for momentum partners. They're among the most well-known and often used approaches within the USAID community. But, how do you choose among them? Next.

Lucy Wilson (00:37:50)

So, in the momentum complexity where monitoring guide, there is a matrix to help you select among the approaches. Over the next couple of slides, we've broken that matrix down and here we start with the five missing or difficult questions that I went over earlier.

Lucy Wilson (00:38:04)

Those are running down the Y axis, while across the X axis at the top, there are the nine complexities where we're monitoring approaches. If their approach is particularly well suited for answering the question, there's a dot. Next. We then looked at timing in the project or intervention. Some of the approaches are best suited to do early and some of us suited to do late in project implementation. But they're really... All of them can be used towards the end of a project lifecycle or as part of the evaluations as we'll see here.

Lucy Wilson (00:38:36)

And then finally, what resources are needed to implement the specific CAM approaches? I know this is super small to read, but remember, it's in the CAM guide as well and we'll be going over it a little bit more next week in session two. So on this section of the matrix, we showed that, many of the approaches can be either or both qualitative or quantitative. Then we look at the ease of use in terms of skills and resources required. And then the level of effort. Finally, the type of engagement means, you can do it entirely remotely, such as from your desk or can you do it virtually or it doesn't require in-person engagement. All of these are just approximations. All of the approaches are highly adaptable and context dependent. Ease

of use may vary based on how the project chooses to implement it and while implementing CAM in a highly participatory way, may be more challenging and time intensive.

Lucy Wilson (00:39:29)

So, much of the rich value that comes from complexity or monitoring, comes from that participation. Okay, next. So, final slide. Mixing and matching. We suggest choosing several approaches to use over the course of your project. The approaches fulfill different functions, at times overlapping and at times appropriate to use together. Some of the approaches have aspects in common, as they may have evolved from or intentionally use aspects of one another. For instance, outcome harvesting uses aspects of contribution analysis and outcome mapping was developed to compliment outcome harvesting. So, the matrix can be used to help select among the approaches and to get ideas of how to use them together. Additional guidance on how specific purchase work well or potentially overlap is also in the guide. So, any questions before we take our quick four minute break? I think the break will be really useful for you all to get some coffee and stretch and come back and engage a little bit more in the next half.

Emily Stammer (00:40:40)

Feel free to come off mute if you have questions, then you don't want to type them. I think that's fine. We're small enough of a group that, that works. Anybody?

Lucy Wilson (00:41:00)

Maybe what we can do is, go to our break and then see if there're any questions before we jump back in? Maybe some people need a few minutes to think about what a question might be?

Emily Stammer (00:41:11)

Yeah. I think that's a great idea.

Lucy Wilson (00:41:15)

Okay. So on our next slide, we'll say that we have a break. We'll take five minutes to stretch, refill your coffee, get a snack, do whatever it is that you need to do and we'll come back at 8:50 Eastern time or 50 minutes past the hour, wherever you are dialing in from. Thanks.

Lucy Wilson (00:44:37)

So, welcome back everyone. I think we've had a couple of minutes for break and wanted to see again, if there was any questions or conversation we wanted to have for a few minutes before we move on to the next speaker. And again, please feel free to come off mute and ask a question or to put a question into the

chat box, whichever works for you? And maybe I'll ask again, if anybody had any examples of unintended outcomes that came up in a project in the past? So, if you have any of those examples that you've thought of since I asked that question a couple of sides ago, feel free to share those as well. Or specific situations or projects that you're working on, that you think would be useful for complexity or monitoring?

Emily Stammer (00:45:59)

I know we personally had one, Lucy. With one of the projects I was doing on impact evaluation with COVID coming along, it was an evaluation of cold chain equipment. And we were really looking at it for routine immunization, but with COVID coming along, we had to kind of switch gears and talk about the effects of COVID on the evaluation. So I think, we tried to use some most significant change in there, but it definitely required a pivot.

Lucy Wilson (00:46:33)

Yeah. And that's an example where that context really changes and you have to change and be adaptive at the same time. So, using a purchase like most significant change can be a good way to find out what's happening, that you weren't anticipating. Okay. Well, maybe we'll go ahead and pass it on to the next speaker. Emily, do you want to make that introduction?

Emily Stammer (00:47:01)

Yeah. So, let's go ahead. I'd like to turn it over to Lara Vaz. She is our senior learning director with MKA and she's going to talk a bit about how CAM approaches can be integrated with M and E and adaptive learning. Lara?

Lara Vaz (00:47:21)

Great. Thanks Emily. And hello everyone. I'm going to slow us down just a tiny bit. Partly because it's still early in the morning for me. And perhaps a big question right now is, where does CAM or complexity we are monitoring, fit into a range of monitoring approaches? So, we'll talk about that a little bit. Next slide please. USAID identified three types of monitoring. The first is, performance monitoring and that is defined as the ongoing and systematic collection of performance indicator data and other quantitative or qualitative information, to reveal whether implementation is on track and whether expected results are being achieved. An example of a performance monitoring indicator taken from the momentum mouth frame is, the number and percent of momentum supportive facilities, conducting maternal perinatal on pediatric death audits and response within the last six months.

Lara Vaz (00:48:27)

By contrast, context monitoring is defined as a systematic collection of information about conditions and external factors relevant to the implementation and performance of a project. An example of context monitoring, also taken from the momentum mouth frame work, is number of COVID 19 cases among health workers in the previous three months. Complimentary monitoring is supplemental monitoring, that can capture additional information to supplement performance and context monitoring. Especially when changes are difficult to predict and or interpret. This is where CAM approaches fit in. As the name suggests, complimentary monitoring approaches, like CAM, do not replace traditional monitoring, but should be integrated within traditional M and E structures. Next slide please.

Lara Vaz (00:49:28)

So, why should projects integrate CAM approaches? Because, CAM approaches build on a project causal framework. They can help to convey underlying assumptions of how outcomes are achieved. Through for example, causal link monitoring. They can also assist in defining the roles of stakeholders and projects through approaches such as social network analysis and help to understand the larger context, using for example, Sentinel indicators. CAM approaches also help to provide a balance between methodological rigor and timely practical information.

Lara Vaz (00:50:05)

Finally, and important for complex projects such as MOMENTUM and others, CAM can help to synthesize learning. Next. So CAM can be easily integrated into the adaptive learning cycle, which creates an enabling environment for the approaches to be used. Adaptive learning ensures that the culture, institutional support and practices are in place to both support the use of the approaches like CAM, and ensure that they're used to their fullest potential. Lucy previously covered how to choose CAM approaches a little bit. And over the course of this workshops here is we're exploring different approaches. We can discuss how these approaches can be integrated with other monitoring and support adaptive learning throughout. I would like to now introduce Mahua Mandal who is a senior army advisor with MKA, and we will talk about her experience using ripple effect mapping.

Emily Stammer (00:51:15)

I think you're on mute.

Mahua Mandal (00:51:20)

Thanks Emily. And thank you, Lara, for that transition. As Lara mentioned, I'll be presenting a big overview of the ripple effect mapping method, and some lessons learned from applying it in two different types of evaluations. Next. So ripple effect mapping method or REM is a participatory group method for evaluating the impact of complex programs or collaboratives. The method engages program and community

stakeholders to retrospectively and visually map the effects resulting from a complex program. And REM is not only a powerful tool for documenting the intended and unintended results of a program, but it's also a way to engage and reenergize community members for around shared goals.

Mahua Mandal (00:52:15)

So REM is typically used as one type of data collection method among a larger suite of methods, whether that's qualitative or quantitative or both. It can engage program stakeholders and participants at different levels. So by that, I mean program designers and implementers, including those who provide trainings or other services, as well as cohorts of direct participants or beneficiaries who receive ongoing or a series of educational and support services. So what skills does REM take? Because of its group participatory nature, conducting a ripple effects mapping evaluation requires a combination of both facilitation and evaluation skills. Session facilitators have to have strong skills for engaging the group in a meaningful discussion, creating open communication and organizing time and simultaneously, they must use evaluation and research skills such as group interviewing and analyzing qualitative data on the fly, meaning while they're actually conducting the facilitation. They have to also engage the participants in the process of generating and refining thematic categories because it is a participatory process and in discovering the causal pathways among the ripples or the effects that they report. Next.

Mahua Mandal (00:53:45)

So how do you conduct a REM? So facilitating a session should ideally include three facilitators broadly. So the main facilitator who encourages sharing and discussion, a mapper who actually maps the outcomes and a note taker, and there are two overall steps in conducting an REM. The first step is the appreciative inquiry. And the second is the group discussions and mapping. So appreciative inquiry is an approach that focuses on the strengths of an organization or program. It defines and further develops the best of what an organization or program offers. And historically, it's been used to address organizational issues, challenges, and changes by building on successful, effective and energizing experiences of its members.

Mahua Mandal (00:54:34)

And then the second part, group reflection is an approach where the group processes, considers and discusses together, the topics that have just been presented or shared. And then the mapping is the process of documenting the most salient parts of the discussion on a visual map so that all of the group members can see and respond to what's being documented and revise as necessary. The immediate product of a REM session is a map that outlines the ripple effects of a program based on that discussion. Next.

Mahua Mandal (00:55:10)



So what's involved with the appreciative inquiry? In this portion, the facilitators ask participants to pair up with someone and each person in the pair interviews each other, asking a standard set of questions that have been developed by the research team based on the program being evaluated. The questions generally ask the participants to share a story based on the program. And here, when I use the terminology 'story', I mean that the questions are to elicit specific outcomes and details of the effects of the program rather than generic responses. The interviewer in each pair can ask follow-up questions for clarification of the initial responses, and this part usually takes 20 minutes, so each person will interview the other about 10 minutes. The facilitator keeps time and encourages participants to take notes as they're interviewing. This isn't always possible, obviously, so this is only in cases where it seems that the participants can take notes. After the interviews, next, sorry.

Mahua Mandal (00:56:14)

After the interviews, the group comes together to discuss responses. And each pair is asked to share with the big group, one of the stories, what they find the most important that they had told each other during the appreciative inquiry. So some of the questions that the facilitator would ask to probe these stories is listed here. They can ask if the story was shared, then the facilitator would say, "Then what happened? Who was involved? What skills or approaches were used? What are people doing differently now and how have relationships changed?" So these are just some examples. Next.

Mahua Mandal (00:56:56)

So here's the mapping. To map, the mapper starts with the program at the center. So they draw the program, the center of a piece of paper, that's usually on the wall or if possible projected, but usually it's taped on a wall. Then the facilitator asks one pair to share their story or one effect of the program that the participant or the community member experienced. Next. And the facilitator writes that down with a connection to the program, the facilitator might probe a little bit more to find out what happened and write that down. Next.

Mahua Mandal (00:57:34)

Then the facilitator probes more. Next. Then the facilitator encourages the group to speak up and share if they had different experiences. So in doing this, you might find someone who had a different outcome or different experience. Next. And you write that down and then you follow that through that ripple. So in this process, you go around until each pair has had shared at least one story, and there are no more effects to be shared and the mapper writes them all down and you can see how all of these things move out from the center like ripples within a wave. Next. So at the end, your map may not look this neat and symmetrical, but this is just a representation of the kind of overall way a map can look. Next.

Mahua Mandal (00:58:33)

So after the mapping, you have selected the map of effects and then the facilitator asks the group to reflect on the map as a whole. So the facilitator may ask what's missing, are there any effects they disagree with, or they have a different perspective on, are there any ripples that are particularly salient to them and they might revise the map or add to the map in that way. Next. So analyzing the REM data. Analyzing the data and the maps starts during the mapping as the pairs of interviewers-interviewee are sharing their stories and the facilitator and the mapper is actually writing everything down. So the facilitator and the map are focused on key outcomes. And then along with the note taker, they also focus on possible themes and sub themes.

Mahua Mandal (00:59:27)

After the maps are drawn by hand, they can then be redrawn using a software program, such as Xmind. Some of these are free, and you can add a layer of analysis by quoting and then clumping into themes, depending on how the data emerge. Additionally, the session transcripts, if you've audio recorded in the notes that the note taker has taken can be coded in a traditional manner in qualitative software, and then the themes and the sub themes that emerge would help fill in and describe the map more fully and describe those stories more fully. Next.

Mahua Mandal (01:00:03)

So this is an example of an illustration that was produced based on REM maps that were developed in an evaluation. This isn't the original REM map, but I wanted to show how an original map can then be adapted and used to tell a story of a program in a way that's visually appealing to other stakeholders, the general public, donors and ministries of health. The lower left part of the illustration is of the larger map or from the larger map. And then the upper right part is a piece of illustration that's been blown up. So one ripple you may see here, it may be a little small for you to see, but up in the top right corner, one is about how a young person who participated in a health program shared that she had learned about HIV and pregnancy prevention methods. And she stated what those methods were. And then the ripple was that she learned how to use a condom and started using condoms with her partner. Next.

Mahua Mandal (01:01:08)

So now I'm going to take a few minutes to talk about how in some non-MOMENTUM programs, REM had been applied in evaluations. These were evaluations of two different types of programs in two countries. The first was in Botswana and this was an evaluation of a multi-sectoral program for orphans and vulnerable children. And the evaluation was focused on OVC's transition to adulthood. One of the objectives was to examine how factors at different levels influenced the education, economic and health trajectories of OVC, and the REM groups in this evaluation work conducted with adolescents. Next.

Mahua Mandal (01:01:46)

The second was an evaluation in Tanzania, and this was an evaluation of a public sector systems strengthening program focused on health governance. One of the objectives of this evaluation was to examine perceptions of various stakeholders on performance and influence of the program on uptake on different types of services and also on community engagement and governance. And the REM groups used in this evaluation were conducted with local government counselors who are adult professionals within the local health sector. So I'm using these two examples because they're very different. They're in two different countries, the programs are very different and the REM groups were very different.

Mahua Mandal (01:02:29)

So what are some lessons learned from using REM in these two evaluations? So we gleaned some lessons in different areas. First, in the training of the evaluation and facilitation staff, we learned that it is very important to clarify the relationship between the facilitator, the mapper and the note taker. During training, it's also important to have those who will do the facilitation actually do a practice session as if they were REM participants in a real, common experience they share.

Mahua Mandal (01:03:01)

So for example, in one training, we had the participants go through the process and map out their experience of going through a bachelor's degree program. And then it's helpful to have the REM facilitators or those who will do the facilitation do a mock session of the specific topic of the evaluation still as REM participants, but this time of the evaluation topic and thinking about the role they might play in the appreciative inquiry interviews. So the reason this is important is because it's very difficult to explain what the process looks like until the facilitators actually go through it as a participant and are able to experience some of the challenges that they may actually face when they're facilitating an REM session. Next.

Mahua Mandal (01:03:55)

We also have lessons learned on tailoring the REM session based on context and the participants. So how will your particular population see the concept mapping? We saw that there were differences between adults and youth, of course. So the questions that are asked during the mapping session may need to be different. Youth may not understand some of the concepts the same way adults do and this is of course true for any sort of evaluation or data collection. There's also an issue around an added issue, perhaps because of the maps, around sensitive topics. So you'll need to decide ahead of time if and how to do the mapping.

Mahua Mandal (01:04:36)

For example, in Botswana, the study was on HIV and health that was part of the evaluation study and youth were skeptical of how confidential the discussion would stay if there were things actually written on a map.

In Botswana, the map also distracted the youth from in-depth discussion, so the team had to on the fly, adapt the process to draw the map to the side and then show it to the youth at the end and discuss it with them. And for multi-pronged programs, which are common with complex evaluations, these may need to be broken down and discussed topic by topic, so you may need to have different maps by topic or theme. Next.

Mahua Mandal (01:05:34)

And then finally, during implementation, it was clear that the facilitators need to really clarify that they want as many details of the effects as possible, rather than generic responses that sometimes we get from typical qualitative data. So for example, a participant may say, when the facilitator asks, "What happened? What did you learn?" the participant may say, "We learned how to manage finances." Then the facilitator would need to probe and say, "Okay, so then what?" And then in this case, the participant responded, "I developed a budget and needed less guidance than I normally do." And that provided a level of detail we wouldn't have received without that probing.

Mahua Mandal (01:06:04)

We also learned that audio recorders can be used depending on the context and the space. So in Botswana, they worked very well because we had adequate space, but in Tanzania, the spaces were expected to be small and a bit noisy, so they were not used at all. And if audio recorders aren't used, then it's really helpful to hold a quality check team meeting with the facilitators right after the session. So that's a quick overview of the REM method and the ways in which it was adapted for two different evaluations in two countries. And I'm going to pause to see if there's questions.

Emily Stammer (01:06:46)

It looks like you have a few, Mahua. There are some from Karen and I can read those to you. So are the groups chosen to ensure safety, comfort, honesty with regards to hierarchy, personal relationships and the like?

Mahua Mandal (01:07:07)

So the way the participants are chosen are or the groups are chosen are very similar to focus group discussions. So generally you'd want to ensure if it's topics around reproductive health and sexuality and maternal health, you would want to ensure that they're divided by gender and by age. You want to make sure that the power dynamics are as level as possible based on characteristics that we know lead to kind of unbalanced power dynamics. So I would say that when we have done it, we have always used the guidance that we used from focus group discussions, making groups from focus group discussions.

Emily Stammer (01:07:54)

Great. She also asks, does the whole process follow this appreciative, sort of positive focus or is there an encouragement of negative ripple documentation as well?

Mahua Mandal (01:08:06)

Yeah, I would say that's actually another lesson learned from using REM in both of the evaluations. We did find that there may have been an overemphasis on the positive ripples. And so the next time this is used in other adaptations, I would encourage to also follow anything that happened that was not intended and not necessarily very positive because that is one of the goals of using REM is to find unintended consequences, and sometimes those unintended consequences are obviously positive, but oftentimes there are also negatives.

Emily Stammer (01:08:51)

Okay. And are the facilitators or mappers, are they seen as representative of an organization or intervention, or how are they perceived by the participants?

Mahua Mandal (01:09:02)

So generally they're perceived as part of the facilitation and evaluation team or the research team. My experience is that they are not part of the program that is being evaluated, so the three, the mapper, the note taker and the facilitator are usually either within the organization who's facilitating the evaluation or consultants for that organization.

Emily Stammer (01:09:38)

Interesting. And then her last question was about the primary value of the process. Is it really for the experiential effect on the participants, or is there a "what next" component, any kind of action planning or anything that follows?

Mahua Mandal (01:09:54)

So in the actual REM session, and then the analysis that comes from the REM session, the boundaries of that is the experiential effects and then what actually the data that comes out of the participants' experiences and how you put that together in themes. But then in terms of using that data, that's kind of the next step and that's not necessarily within the boundaries of doing the REM, but it's like any other type of evaluation method where then often the evaluators ideally work very closely with the program implementers and designers to do that sort of "These are the data that we received, and these are the results, and what does this actually mean for programming? Can strategic work planning be done based on this data?" So it's that next step. It doesn't fall in the boundaries of the evaluation, but certainly I think those who use REM see it as a tool for that next step.

Emily Stammer (01:11:01)

Great. I see there's one question for Lucy about the stage of program life cycle for CAM, but before she answers that, are there any more questions for Mahua about ripple effect mapping? And feel free to come off mute, you don't have to put your question in the chat if you don't want to.

Emily Stammer (01:11:35)

Okay. All right. So Lucy, I feel [Erdonas 01:11:40] has a question about what stage of a program life cycle, when should CAM be introduced?

Lucy Wilson (01:11:49)

Yeah, that's a great question. And actually, Sammy, if you could go back to slide 50, I think it's going to be slide 50, there's part of the matrix that's in the CAM guide. It's looking at timing and thanks. Timing for the different approaches and while this is suggestive, I think like everything in complex situations and with complex data monitoring, being adaptive is essential. And so while it may be, of course, ideal to plan for and budget using complex statement monitoring approaches from the beginning of an intervention. And there may be some that are most useful at the beginning of an intervention. In reality, you don't always know what information you're going to need and how a CAM approach may be useful until you get into the implementation and see what's happening. So many of them can be implemented at various stages, including towards the end, if that's what your timing and your situation calls for, so it's a great question, and I don't have a really clear answer, but I think that's just part of the nature of it is to be adaptable.

Lucy Wilson (01:13:06)

And I also want to make a comment on that last question to Mahua about the "what next" and integrating the use of the REM approach. Some of the other CAM approaches have a really specific final step within their approach, like if there's various six steps to using outcome mapping, that last step will really specifically be using the recommendations and changing the system and integrating that adaptive learning as a step or within the boundaries, as Mahua said, of the approach. And others assume that you'll do that because that's good and they practice. And again, part of the adapting is that you may say, outcome mapping calls for a specific way of doing, use at the end of it, we're going to make it slightly different to work within the other adaptive learning systems that we already have set up for our project. So I hope that helps as well. Are there any other questions?

Emily Stammer (01:14:22)

Okay. We'll give an opportunity for some questions maybe after we get back out from the breakout groups, but I think at this point we would like to switch gears and go into some breakout discussions. And we've assigned everyone to a breakout room that we'll be sending you to shortly. Each group is going to have a

facilitator who will self-identify in the group, but it'll probably be one of today's speakers or another MKA staff member. And we have created one group for our French speakers that Lara will be facilitating. I'm putting the questions that we'd like you... Can go to the next slide, Sammy?

Emily Stammer (01:15:11)

These are the topics for the questions for the breakout groups. I think we'll spend about 20 minutes, 15 to 20 minutes in the breakout groups, let's do 15 before we come back together to close out. The other thing I'm going to put that might be helpful. The last question we're asking you to introduce yourself, talk about who's worked on complexity or monitoring before, what stood out as most interesting from the presentations and how CAM could be applied to your project's learning agenda.

Emily Stammer (01:16:10)

I'm going to go ahead and put the learning agenda for momentum in the chat. I think only our momentum internal colleagues will have access to that on the hub but thought it would be a helpful reference for momentum folks. I think if we can go ahead and break out into the groups for about 15 minutes, we'll see you all back shortly.

Lucy Wilson (01:20:22)

It looks like we've got everybody back. Welcome back from your breakout rooms. Let's see, we want to take just a few minutes here to discuss, if you have a specific interesting tidbit that came out of your group, it'd be great to share it and you can go off mute. You can use the raise-your-hand function if you want to, and we'll call on folks to... Call or if there's quiet, just feel free to go ahead and go off mute and share.

Lucy Wilson (01:20:56)

We don't need a full account of what happened in your breakout discussions, but just a couple of things, one or two things that you found interesting. And I'll start by sharing one of the good conversations that I think was just happening at the end of our discussion was the idea of low touch, medium touch and high touch application of these approaches. Because many times, the complex situation is such that you don't necessarily have the ability to draw people in and engage in a really high touch full on implementation of an approach, but would be looking for ways to draw elements of it, to get some more rapid learning. We will be talking a little bit later on in the workshop series next week. As well as for some of the specific approaches in the following sessions on how to think about adapting the approaches to a low, medium, and high touch implementation.

Lucy Wilson (01:21:57)

So, others want to share some of the interesting conversations that were coming up in your breakout rooms?

Lara Vaz (01:22:14)

Let's see, we had a really nice discussion in French, and I'm very grateful to the Francophones for tolerating my broken French this morning. I think we have a really nice mix of people who were working in complex settings and understanding complex settings and some mixed experiences, most had not used it before, but everyone seems to be really interested in figuring out how to best incorporate it internally.

Soumya Alva (01:22:59)

We had a mixed group of people, some more closely involved with momentum and some people less so. We spent... Basically in terms of methods there were a couple of examples in which when people had used positive reflect and Karen Levin was part of our group and she's going to be talking about that more in the way they've used it within their projects in one of the later sessions, session four, I believe. And talk a little bit about how it would vary because positive reflect could take place at a country level, facility level, and so on. Often for an internal learning. And then you could have data for decision making or positive-reflect type sessions at the global level with synthesized information from the country level, so it could take place at different levels, that's something that came up. A question that she had was trying to understand with all of these methods that we're talking about, are they a one-time method and you just get findings? Or how do we actually use them for monitoring purposes as part of our projects? And that's the question that came up that may be relevant to everybody.

Lucy Wilson (01:24:15)

Yeah that's a ... That's a great question. And I think one that we've definitely been talking about with an [MKAA 01:24:20] is thinking about how to use these approaches, not just as evaluation approaches, but also as monitoring approaches. I think it varies by the approach and as we get into them, hopefully, we'll see some examples of how they've been used as both monitoring and evaluation. I know for outcome harvesting, their examples come from both sides. Others who want to share? Luis, do you want to come off mute and talk about what you have in chat?

Luis Ortiz-Echevarria (01:24:53)

Yeah. Just with the comment beforehand on light touch, medium touch, we touched upon this. Because we will expect that there would be adaptation based on context and timing and a whole bunch of different factors. I guess my comment was, at what point do we need to define what the minimum amount of each one of these approaches is before it's no longer true to the method? I've seen this a lot with HCD work or there... You will want to apply HCD principles, but may not have a full background of it. And sometimes I



feel like there's a nervousness to even try to apply it like HCD light, because we don't feel that we have the full discipline behind us. I don't know if other groups talked about what is the absolute minimum for us to stay true to our methods in CAM.

Lucy Wilson (01:26:02)

You definitely have a plus one on that already. It's a tricky dilemma. We'll talk about it a little bit again next week, but there isn't necessarily a hard and fast rule, it's thinking about what does bring rigor to an approach. And then how can you make sure that you're still applying that rigor, even if you're making adaptations.

Lucy Wilson (01:26:29)

Any other questions before we wrap up and go into the takeaways?

Srishti Shah (01:26:39)

Hi, not a question, but I think a lot of us in our group talked about how RAM also all helps us in knowledge management space and how a lot of the tools we could be using to create case studies and communications and materials from that. So, that sounds really interesting to people who are not M&E. I am like a comms person so, yeah.

Lucy Wilson (01:27:06)

Yeah, that's a good point. Sometimes it does allude to good case studies and communication tools. And I think that's one place where we sometimes have to be cautious about the rigor though, of not filling the best stories and only sharing the ones that would look good for the donors, but pulling a real representative sample. Okay. I'm going to hand it over to Emily to do some wrap up.

Emily Stammer (01:27:32)

Yes. Thank you... But it does look like we have the one question I see. Alan, do you have your, your hand up?

Alain Blaise Tatsinkou (01:27:41)

Yes I do

Emily Stammer (01:27:43)

Please go ahead.

Alain Blaise Tatsinkou (01:27:44)

No, no, just that is my takeaway here. Like for the first time, I, our learning agenda in what we are doing with EMright, then we, I mean, I did not think of having monitoring as part of the learning agenda. So coming from here today, this is something that I would like to share because it's, that is my first takeaway from, from the first meeting. Like I will now integrate monitoring in our learning agenda, given the fact that we, we are really planning to have innovative strategy for immunization, this kind of interventions that we are not used to, that we are innovating with the momentum project. So thank you.

Lucy Wilson (01:28:29)

Great. I'm glad that you found that useful. That's a good point, depending on what learning questions are sometimes monitoring will work.

Emily Stammer (01:28:39)

Great. Okay. All right. Let's see if there isn't anything else. Yes, we will go ahead and wrap up, next slide, please. So we just want to talk briefly about today's main takeaways, basically that first complexity it's common in most situations under momentum awards. I mean, I know I originally thought this is just for fragile settings, but we all work in really complex settings and it applies to all of us. So I think we, we can all find a way to use CAM.

Emily Stammer (01:29:18)

CAM can be used to, to help questions that were not easily addressed by traditional M&E things that we aren't necessarily getting at. We can mix and match these CAM approaches, if you, you know, you can do components of pause and reflect and most significant change that, that these, they, they work well together, but also that we can integrate them with traditional performance M&E. That adaptive learning and CAM approaches are complementary. I think in our breakout session, we talked a bit about how it's kind of just a big, a big ball of, of adaptive learning and CAM, and that it, that it's, they're all incredibly complimentary and work well together and, and need one another. And then finally, just that ripple effect mapping is one of the useful, is a useful CAM approach that can help identify on anticipated outcomes and factors that contribute to outcomes.

Emily Stammer (01:30:23)

So just a let's see, next slide, please. There we go. So to prepare for the next session, the next session will be Wednesday, June 23rd. I will put the link to sign up for that in the, in the chat here in just a second, but we're going to talk more about how to prepare to implement CAM approaches. So facilitation skills, talking about systems thinking, strategy and qualitative inquiry.

Emily Stammer (01:31:01)

We're also going to talk about and focus quite a bit on strengthening theories of change, getting ready, you know, having these causal frameworks prepared for CAM. Adapting CAM approaches and developing a plan to implement some of these approaches. We'll be talking about more examples of CAM in practice. Next week, will be a presentation about root cause analysis from Jeff Brashear of EMright. Don't forget to register. We'll also have the slides available and the recording available on the momentum platform. If you haven't already registered, I'm putting the link in the chat right now. You can register there. If you're part of the momentum suite of awards, we can get you, you'll be able to access to the materials there. Again, like I mentioned earlier, if you're outside the suite of awards, we're talking about making the, the materials available externally as well. We'll keep you updated on that. Otherwise I am going to pass it back over to Lucy for our pause and reflect here at the end.

Lucy Wilson (01:32:19)

Great. So as we mentioned, we'll give everyone a chance to have participated in a complexity where monitoring approach. If you stay on the line for another couple of minutes, you can say that you will have now done it, and we'll be doing a cause and reflect at the end of each of the sessions and going through some different approaches that can be used. We'll use after action review today, which is one of the most commonly known and used approaches. So the five questions associated with after action reviews are at the left.

Lucy Wilson (01:32:52)

Take a minute. We'll take a minute of silence to reflect on these questions. And while we do that, Sammy, can you actually leave this slide up so that people can be looking at the questions. Then after a minute, everyone can grab the link to the rise up tab. That'll be in the chat, put it into your browser and start jotting down your thoughts and response to the questions. Sammy will then share the responses on the zoom screen. So we'll have a quick minute of silence. And if you do need to sign off to go to another meeting, you can look at the rise up pad link later in the day to add in your thoughts or read what others shared. We'll come back for a couple of minutes of discussion, a couple of minutes of discussions too. So I'm going to give you a minute to reflect silently.

Lucy Wilson (01:34:37)

Okay. Okay. Do we want to switch over to the rise up tab? Okay. Everyone can start. If you haven't already started, go ahead and add in your responses to the after action review questions. And typically an after action review, we'll use these five questions, but sometimes the shortened version will be used, but what did you expect? What actually happened? What went well? What did not go well? And then what should we do next time? So...it looks like a lot of people were expecting an orientation and overview. It seems like

people did feel like that's what happened. I like all the plus ones. That's a great way to add onto what somebody has already put up on the pad. And yeah, good point. There's a lot of information here. It's it may take some time to soak it all in.

Lucy Wilson (01:35:48)

So as far as what went well, it was helpful. And I appreciated particularly the slides with the matrix about when to use and how difficult they are to use. The practical example from Mahua was well appreciated. A couple of more points about the matrix slide is being particularly useful. And again, the REM example being useful in bringing CAM to life, the grounded experiences applying case methods, the breakout sessions were helpful to digest, lots of appreciation for the ripple effects monitoring, the ripple effects mapping, sorry. And we will be integrating as many case studies as we can going forward. So that's really nice to hear that that was appreciated.

Lucy Wilson (01:36:52)

Yeah. What did not go so well? Yeah. Participation was not flowing and perhaps that's because we were moving so quick through a lot of complicated content upfront. So yes, that's probably good feedback for me to go slower in the future. I love getting feedback about how to do things better. So thank you for sharing that. I appreciate it.

Lucy Wilson (01:37:23)

So the breakout rooms were hard when just reacting, particularly when we don't know each other. Well, that's a, that's a really interesting comment. And we have talked about how to perhaps do things differently with the breakout rooms in the future. So if you have suggestions for how to do the breakout rooms in future sessions, that'd be a great thing to see. Now, a little technical for non M&E peeps.

Lucy Wilson (01:37:47)

That's also good feedback. I like it. Maybe longer breakout sessions. And then, so what should we do next time? This is what I'm really excited about. Practice, sending the guide around before the sessions, encouraging everyone to do the pre read. That's an interesting one. And yet again, the pace being pretty fast ... the how getting buy-in from CAM from decision makers value add, I think that is some things that we'll be going over next week, but I liked some of the specific points in this comment. And as far as examples from this, the field, yes, we will be getting more in the future ones. Ooh. A simulation exercise and yes, copies of the presentations will be shared as Emily said in about a week, but maybe beforehand, too. That's an interesting idea. So we're at 9:59. So I think I'm going to wrap up and say thank you to everyone for joining us today. And thank you for the presenters. Let's see, Emily any other last minute comments that you want to make?

Emily Stammer (01:39:12)

No, just don't forget to register for next week's session. We look forward to seeing you all thank you to Lucy, to Barbara, to Laura, to Mahua, to our, our breakout group facilitators and to all of you for joining me, we really hope we'll, we'll take your feedback into consideration and hope to see you again next week. So thank you all so much. Have a great day.