WEBINAR TRANSCRIPT: COMPLEXITY AWARE MONITORING (CAM) WORKSHOP SERIES

SESSION 2: PREPING FOR CAM

Emily Stammer (00:00:00)

So, hi everyone. Good afternoon, good morning, good evening. Thank you all for taking the time to join us today. My name is Emily Stammer. I'm an MEL advisor with MOMENTUM Knowledge Accelerator, MKA and I'd like to give you all a warm welcome to the second session of the MOMENTUM, Complexity Aware Monitoring Workshop Series. Next slide. As I mentioned, we have a pretty full agenda today. I want to just start off with a few housekeeping and resources to mention. To start with housekeeping, if you could please stay on mute when you're not talking, we are trying to conserve bandwidth for the main sessions. I'll ask only the presenters have their cameras on if they'd like. But in the breakout sessions, we'll have one of those today, if you'd like to turn your camera on, please feel free. We've set aside a number of times within the presentation to answer questions.

Emily Stammer (00:01:02)

So, feel free to ask questions during those times. But if you also want to go ahead and put questions in the chat as we go, please feel free to do that. We'll try to answer them. Again this week, we will be using Riseup Pad for a few points within the presentation. Again, we'll share the link in the chat. You just click on that and type your responses to the questions that are listed in. The responses are anonymous. So, we'll use that a little bit later in the session. If at any point you have challenges with audio or visual, video, anything, please reach out in the chat. We have Devin on hand to help out with that, so she can respond to you and hopefully do some troubleshooting. We will be recording the session. Recordings will be placed on the KM platform along with the presentations as soon after the session as possible. I don't know if some of you were participating in session one, those recordings and the presentations are available on the hub.

Emily Stammer (00:02:09)

We emailed it out to everyone who participated in session one. If you're outside of MOMENTUM, we'll work to make those available to you once the workshop concludes. Before we get started today, I also want to put in a quick plug for a new CAM resource collection that we posted on the hub this week. It outlines a number of source documents that were used to create the CAM guide as well as the workshop. We're hoping to expand that collection as we go. So if you have resources to add, please feel free to reach out and let us know and we can add those in and expand the collection of it. Let's see. We can put the link to that in the chat if possible and you can see that's on the hub. So, that has these kind of an internal resource. Next slide.

Emily Stammer (00:02:59)

I want to quickly go over today's session objectives. Today what we're hoping is, to prepare MOMENTUM staff and our external guests for implementing CAM approaches. We want to support participants to strengthen their theories of change and to improve participants understanding of how to adapt CAM approaches to their award or activity contexts and to develop a plan to implement CAM approaches. Just as always and we mentioned this last time, the workshop is complimented by the CAM guide that Lucy Wilson helps put together, which is also posted on the hub if you are interested. And I think on the MOMENTUM external websites, so anybody can access. Next slide.

Emily Stammer (00:03:58)

So, quickly want to just introduce today's presenters. We have Lucy Wilson. She's a CAM consultant with MOMENTUM Knowledge Accelerator. Mahua Mandal, who is a senior MNE technical advisor with MOMENTUM Knowledge Accelerator. And then, I'll also be presenting later on in the session. Now that I've introduced the presenters, I would love for all of you who are on the line and who are willing to introduce yourselves in the chat. If you can include your name, your title, maybe your organization affiliation and which MOMENTUM you are affiliated with. If that's applicable, if you're calling in from outside the US and you want to include your country where you're joining us from, that would be great too.

Emily Stammer (00:04:45)

Next slide. So for today's session, we've broken it up into four parts. We'll start out with Lucy, who'll be presenting on preparing for complexity aware monitoring. She will be followed by Mahua, who will be speaking about developing a strong theory of change. We'll take a quick break at that point and have a discussion group after the break. Then with part three, I'll be speaking more about adapting CAM to specific context and developing an implementation plan. And then, we will wrap up and do another Pause and Reflect activity. So with that, I'm going to turn it over to Lucy Wilson to do a quick recap from last week and then talk more about preparing to use CAM approaches. Lucy?

Lucy Wilson (00:05:40)

Great. Thanks Emily. And hello everyone. Good morning, good afternoon, good evening. Next slide. As Emily said, we'll start out with a quick review from last week. And I know there was a lot of content last week. It was a lot to cover and we went really fast. The good news is that, everything we covered is also in the MOMENTUM CAM guide and up on the hub that Emily just mentioned. So, we learned that complexity is common in those situations, under MOMENTUM awards and complexity, where monitoring can help answer questions, not easily addressed by traditional M and E. These questions include what I referred to as the five missing and difficult questions. CAM approaches can be mixed and matched together. We'll see that some today. It's also integrated within traditional performance M and E. Adaptive learning in CAM approaches are complimentary. And then last week, we also had a great case study from Mahua on ripple effects mapping, which is a great CAM approach for identifying unanticipated outcomes and the factors contributing to outcomes. Next.

Lucy Wilson (00:06:55)

So, how is CAM different from traditional performance M and E? We've talked about this some last week. But, now that you've had some time to reflect what feels different from your perspective. We'll ask you to respond to this question on the Riseup Pad, but first in my opinion, while CAM in traditional M and E approaches build from the same tools and concepts, CAM approaches may help to address different purposes and sometimes call for new and different skills and perspectives. Now, grab the link to the Riseup Pad from the chat, put it in your browser and start adding your responses. Sammy, can you switch over please? Again, what feels different to you between CAM and traditional performance M and E? What are the different tools, purposes, skills, perspectives that stand out? Hopefully, you all can get the pad open and type in. It looks like at least one person is able to start contributing.

Lucy Wilson (00:08:11)

Yeah, here we go. People who got thoughts coming in.

Lucy Wilson (00:08:30)

So, CAM not necessarily dealing with numbers, that's something we'll talk about a little bit later today. Can be more qualitative. Likewise, somebody said subjective perspective of the program, more so than traditional M and E, that does definitely take into different stakeholder’s perspectives. So, we get some of that. More adaptive, that's right. Indicators are not as rigid. There's some good feedback here. And I think some of it we'll really get into today. Not necessarily an accountability mechanism, that's an interesting response. I like it. It can be, but it's not necessarily the way that we usually think of it. Acknowledges the reality that we don't know all the possible outcomes. That's great. Absolutely.

Lucy Wilson (00:09:35)

We've got some long responses here. I like this, that it helps to break down silos between the M and E and the tech team. I see that, that person is still answering, but I think that's a really interesting point. It certainly has helped me break down some silos in different ways. Well, I think maybe we'll go ahead and switch back, look at some of the slides. Thank you all for putting in your feedback. I'll go back and look at more at those later.

Lucy Wilson (00:10:14)

Okay. So, I think we can go on to the next slide. And, this is just a quick overview of it, I'll be covering in my section. Building on the last slide, the focus will be on purpose skills, perspectives and tools. We'll do a few slides on the purpose of M and E and when CAM is appropriate. Then, we'll talk about the skills that are relevant to complexity where monitoring, as well as the perspectives. And finally, the tools

specifically causal frameworks, which are also used in traditional performance M and E. And as a reminder from last week, I often talk about causal frameworks as a catch all term for things like theories of change and logic models, since different CAM approaches use different terminology, but Mahua specifically discussed theories of change, since that's what's most commonly used within MOMENTUM. Next step. And yeah, please go ahead and continue introducing yourself in the chat, if you haven't gotten a chance to do that yet.

Lucy Wilson (00:11:12)

Okay. So, what is the purpose of our M and E? In my opinion, there are four purposes for doing M and E. First, funder accountability. Are we doing what we said we would do? Are we spending money wisely? Second, project improvement is what we're doing, helping us meet our objectives. What could we be doing better? And then, stakeholder responsiveness, are we doing things that our stakeholders want us to be doing? Are we spending their time and resources wisely and strengthening rather harming their systems? And then, expanding knowledge is what we're doing a model for others to replicate. So, for which of these purposes, that CAM be most appropriate? Sammy, can you launch the poll?

Lucy Wilson (00:11:53)

We're going to ask you to give your responses here. You can choose more than one option if you'd like, but which of these do you think it's most appropriate for CAM? Got some good responses coming in. I also want to make clear that there's not necessarily a right or wrong answer, but the ways that we think of answering this question. Where do you feel like it would be most appropriate in your projects? Seems like starting to slow down. So, maybe we'll go ahead and close it. Interesting. The option two in project improvement looks like it definitely got the most votes, followed by expanding knowledge and then close behind, responsive to stakeholder. And then finally, the accountability. Again, there's not necessarily a right or wrong answer here, complexity where monitoring can be used for any of these purposes, but also other traditional performance M and E approaches. So, what would be appropriate for some of the other purposes? Close down the poll. Funder accountability, often starts with performance monitoring. And I often think of expanding knowledge is generally addressed through research approaches. And so next slide.

Lucy Wilson (00:13:49)

Speaking of research, this is just a little comic that illustrates the point that research and evaluation can have different purposes. Hopefully these two guys aren't thinking about the same activity that they'd be co-leading together because, they need to be in agreement about their purpose. Next slide.

Lucy Wilson (00:14:10)

So, this is a rather complicated mapping of various types of evaluations. It's supposed to depict a bus map with different lines, leaving a central station and going out in different directions. Overall, it has way more going on with it than we need to digest. But the idea is that, different types of evaluations have different purposes depicted by the best lines. Over on the orange line, our research methodologies, including RCTs. In many of the complexity aware, monitoring approaches are on the other side, on the dotted blue line between the green and yellow lines. So, they fall somewhere in between what the author of this describes it's use in theory. His lines are different from my lines, but I hope the idea gets across. Next.

Lucy Wilson (00:15:00)

So, sometimes we get pushback when we talk about Complexity Aware Monitoring, because these approaches aren't necessarily as rigorous as research experimental design evaluations. So, I use this slide to be clear that Complexity Aware Monitoring and research are different in terms of purpose, the questions they answer and the situations in which they are most useful. As such, it is hard to say that we should be using more rigorous research type methods, when those methods don't always address the purpose question in situations that we're facing. In my experience, resistance or pushback to Complexity Aware Monitoring usually happens at a theoretical level. When the specific use scenario is vague, it can be easy to argue for more rigorous approaches. But when you take a specific intervention for situation or a specific question that you want to address, using CAM approaches suddenly makes more sense. And there's a reminder, Complexity Aware Monitoring and other approaches including research can be combined together to answer various questions. Next.

Lucy Wilson (00:16:05)

So, rigor has come up a couple of times. How do we bring rigor to Complexity Aware Monitoring? Last week, I talked a bit about attribution versus contribution. While CAM doesn't look at attribution, the approaches often outlined specific ways to demonstrate contributions, while also acknowledging the importance of collaboration. Then, while an RCT use is quantifiable measures, CAM relies on measures that are documentable. You can show that it happened and or have it validated by an external third party. Then to reduce bias, CAM approaches call for wide participation with stakeholders, external validation and or triangulation of data sources. And finally, CAM approaches often build on strong evidence-based causal frameworks to bring rigor or their approach includes steps to strengthen the causal framework. Next.

Lucy Wilson (00:17:01)

In the next couple of slides, we'll walk through some of the skills needed for Complexity Aware Monitoring, that might be different from traditional performance M and E. I want to emphasize that you don't have to have all of these skills yourself today. There may be others within your team or organization, who have the skills and with whom you can collaborate. And you can work on expanding these skills within yourself and your team. We'll talk about some resources to do that. You can also reach out to others within the MOMENTUM suite, as we want to be building your cross project networks. Next.

Lucy Wilson (00:17:34)

So, qualitative and quantitative came up earlier and while CAM approaches do not necessarily use qualitative data collection and analysis methods, many of them do. This often means a greater emphasis on telling a story. And in that story is, what was the context? What other factors contributed and what happened that was different from what was intended? This means there's less emphasis on statistical analysis and answering questions like, when targets met and how did A compare to B? Next. So, what skills are needed for this qualitative inquiry? Things like engaging a wide range of stakeholders, eliciting stories from those stakeholders, and then finding themes from across the stories. Writing up the results in a way that tells the whole story and then including quantitative elements, if appropriate, and then validating the story to ensure it is evidence-based accurate and representative. So, while some of these points fall down to strong writing skills or could draw on qualitative research related M and E skills, some of these things like engaging stakeholders, eliciting stories, require facilitation skills. Next.

Lucy Wilson (00:18:47)

So on the right, in the work cloud are some of the skills that you need for facilitation. Asking questions, being prepared, being flexible, managing group dynamics, et cetera. Then in considering how challenging the facilitation will be, you should be asking questions such as, how big will the group be? How diverse will it be? More challenging the facilitation, the more essential skills. Next. So, here is a very quick list of resources for facilitation. It's just the beginning and hopefully you'll have other suggestions that you can add to the chat. Liberating structures is a great resource. There's also a recent book on facilitation, specifically for evaluation. There are also opportunities for training and professional development, perhaps within your own organization or at a local university. Encompass is a group that runs trainings for international development type folks, including on facilitation. Again, if you have any resources that you've used to expand your facilitation skills, please add those to the chat and we'll review them in a minute. And who are the really good, confident facilitators that could support MOMENTUM teams with CAM approaches? If you have recommendations, put those in the chat too. Next.

Lucy Wilson (00:20:09)

So now, I'm going to switch from skills to perspectives. And first up is this systems-thinking. A reminder of what I mean by systems and systems thinking is on the right. A system is the broad set of ever-changing stakeholders, their diverse perspectives, their interrelationships and the boundaries within which they engage, as they work towards a common purpose. You don't need to be an expert in this, but you should be familiar with the concepts and how it applies to your project. One way to start using a systems-thinking perspective, is to just make a really simple systems map for your project. There are various tools and guides to help you make a more sophisticated systems map, but you can start with just pen and paper. So begin with your causal framework, focusing on the outcomes and the impact. Who and what else effects those same outcomes and impacts. These are the actors or elements and can be added to your map.

Lucy Wilson (00:21:08)

How do those elements interact with each other and with your project? Those are the connections. You can draw them on the map. And then, if there are loops or changes in one element, creates changes in other elements, reflecting back on the first, like a supply and demand kind of loop. Put those things on the paper, and you'll start to see how the wider system interacts with your project. Also, if anyone has any resources they'd like to recommend on systems-thinking, please add those to the chat as well. Next.

Lucy Wilson (00:21:42)

Another perspective that's important for Complexity Aware Monitoring is adaptive learning. We've mentioned this a few times already. Again, most Complexity Aware Monitoring approaches include some aspect of adaptation and learning. And depending on your team, you may be doing this really well already, or you may want to be developing the culture, leadership, institutional support and practices needed for project staff, to be ready to use the information that comes from the approaches, to adapt and change. You may also be wanting to work with your team to build skills and good habits and communication and listening, recognizing failure and solutions and reviewing data for improvement. And you may be thinking, but I'm not the project director or the manager, but here's some ideas for those of you who are MNE officers, including engaging the team members, supporting regular data use in reinforcing and modeling positive, adaptive learning behaviors. More ideas about ensuring an adaptive learning perspective can be found in the MKA adaptive learning guide. The link is also in the chat. Next.

Lucy Wilson (00:23:00)

So, to the tools, causal frameworks, this is a not very accurate description of how to implement some Complexity Aware Monitoring approaches. There's also often a series of steps that begins with developing a strong causal framework. You then ask your stakeholders to help you expand on or further strengthen the causal framework. You then collect data, based on that causal framework. Use the strong evidence-based causal framework to validate your findings. Improve the causal framework based on what you learn and repeat again from step one. This is a bit tongue in cheek here, but the moral of the story is, you haven't heard us repeat it over and over again already, a strong causal framework is really essential. And so with that, I'm going to hand it over to Mahua Mandal from MKA to talk us through developing a strong theory of change. But, any questions before I do that?

Emily Stammer (00:24:04)

There haven't been any questions in the chat. And it sounds like everybody's still waking up.

Lucy Wilson (00:24:08)

Still drinking their coffee this morning.

Emily Stammer (00:24:10)

Yup.

Mahua Mandal (00:24:15)

Okay. If there're no questions... See, none have come in. Okay. One question for you, Lucy.

Lucy Wilson (00:24:28)

Great. Thanks, Farhan. How and when do you select which CAM methods to use? It's a great question. Last week, we talked a little bit about the matrix that's in the CAM guide that talks about when in a project cycle, it can be a useful time to use an approach. There's a matrix there, that gives some timing for the different approaches. But often, that's just suggestive. You may want to think about, I think ideally from the beginning of a project where CAM would be most useful.

Lucy Wilson (00:25:07)

So ideally early on, but in reality, you may not realize the specific places where it will be useful until you get into the project, and that's just part of being adaptive. So the answer, I think varies. And then to how, again, I think we really tried to put that matrix together to help people figure out which CAM method to use, to answer which questions. Again that matrix is a useful way to think about which one. And don't worry about apologizing, understand it was a lot of information last week. Thanks for the question. Maybe over to you, Mahua?

Mahua Mandal (00:26:08)

Thanks Lucy. Good morning, good afternoon, good evening to everyone. Thanks for coming back for the second week. As Lucy mentioned, I am going to go through how to develop a strong theory of change. Lucy mentioned the term causal framework. I am saying theory of change. You'll hear a few other terms that we use that mean, not necessarily the same thing, but similar types of things. I will spend a little bit, just a minute or two talking about the different terminologies. But in this portion of these two hours, we will be talking about a theory of change and how it may be different from other types of frameworks that you may have heard of. Next slide.

Mahua Mandal (00:27:00)

Before we get into the nitty gritty, let's do a quick poll. There's two questions for the polls, there's two polls. First, have you been involved in developing a theory of change, however it is that you understand what a theory of change is, for any intervention or any project? The second question is, have you been involved in developing a theory of change for MOMENTUM whether it's your MOMENTUM project, or have been invited to work with other MOMENTUM colleagues? Let's take a few minutes. Looks like about 17 people have answered, maybe another few seconds. I think there's about a 30 participants minus the facilitators, so let's take a few more seconds to let the rest of you answer. It's a yes or no question, so pretty simple.

Mahua Mandal (00:28:05)

It looks like many people have been involved with developing a theory of change for any type of intervention or project, but most people have not been involved with developing the theory of change for a MOMENTUM award. This is good to know. So many of you know already, probably some of the basics around what a theory of change is. We will talk about it relative to an entire project like MOMENTUM and then a little more specifically in terms of monitoring and evaluation of particular components of the project. Okay, thanks Sammy, next slide.

Mahua Mandal (00:28:46)

What is a theory of change? A theory of change is a comprehensive description and an illustration of how and why a desired change is expected to happen in a particular context. That definition is taken directly from the Center for Theory of Change and there's a website that goes along with that center, that you can see there. So it's a visual representation of the causal pathway, and the causal pathway is basically how you envision the intervention is expected to achieve its impacts or goal. In the theory of change, activities are linked to one or more outcomes, and then those outcomes are linked to the ultimate impact or goal.

Mahua Mandal (00:28:36)

The associations between the activities and outcomes can be tested empirically, meaning you can actually use data to test whether the activities are associated with the outcomes. And depending on how much data you collect, whether the outcomes are associated with an impact. What makes a theory of change a little different, and we'll go through some more differences in the next few slides, but a theory of change is often not linear. Often theories of change have arrows with feedback loops and they look quite different from earlier frameworks we've used in monitoring and evaluation. Next slide.

Mahua Mandal (00:30:22)

One of the most important aspects of a theory of change is that it's explicit about "the missing middle". That means it explicitly states the outcomes that activities are theorized to lead to, and it provides the justification. This justification may come from the scientific evidence from other studies or other evaluations, or the justification may come out from well-thought-out hypotheses that are based on evidence in the field. This justification is for why the activities will lead to outcomes and then why outcomes would lead to impact.

Mahua Mandal (00:31:01)

In this part two, we see two mathematicians or scientists. They're working on a formula on the blackboard and part of the formula is on the left, part is on the right, and then in the middle, we see that the formula is missing, it says then a miracle occurs. One colleague says to the other, "I think you should be more explicit here in step two." With a theory of change, we are always explicit about each step, including that middle portion. When we develop a theory of change, it is in an effort to ensure that we don't see a miracle occurs, and then we get the outcomes or the impact. Next slide.

Mahua Mandal (00:31:44)

You may not be able to see all of the text here, but this is an example of a theory of change. This is the Cross-MOMENTUM theory of change that MOMENTUM Knowledge Accelerator had drafted, which represents kind of the full body of work that MOMENTUM awards would do and how the activities would lead to outcomes and impact. Since this is a MOMENTUM-wide theory of change, it's quite broad, but in the middle box here, we do see that it includes explicit outcomes, such as availability of evidence-base, quality MNCHN/FP/RH services and increased patient-centered care, including provider-client interaction. And that these lead to a specific result, which lead to the ultimate goal, which is reductions in maternal morbidity and mortality. Next slide.

Mahua Mandal (00:32:43)

As I mentioned, that there's other types of frameworks or models that have been used in monitoring and evaluation programs and these are some of the terminology that you may be familiar with. There's logic model, causal framework, results framework, log frames. There may be others as well that you've come across. Next slide.

Mahua Mandal (00:33:03)

This is an example of a logic framework for log frame. This is quite archaic, I believe. I don't believe this is used as much, but you may have seen this if you've been in the monitoring and evaluation field for some time. Logical frameworks are rigidly structured, they do include things like resources, inputs, outputs, and impact. And they may include indicators, but they don't necessarily, you can see this is more like a matrix, so it doesn't necessarily explain how the various components work together in a causal pathway to achieve a specific impact. And it doesn't actually link activities to outcomes. Next slide.

Mahua Mandal (00:33:46)

This is an example of a logic model, and this is a simplified model. We see that there's a rigid linear way in which this articulates inputs, activities, outcomes. But it doesn't, again, necessarily explicitly say how each input is related to each activity, is related to each output. Again, it is very linear, we see all the arrows pointing towards the right. Next slide.

Mahua Mandal (00:34:20)

This is an example of a theory of change, and again, you may not be able to read all of the text, but what I want to point your attention to is how different this structure looks from the previous examples of a logic framework or a logic model. This is a very good example of how a theory of change can be more flexible. It's not necessarily linear. We see arrows going in many different directions. We see bidirectional arrows here. Theories of change can allow for multiple causal pathways, there's different levels of intervention and feedback loops.

Mahua Mandal (00:34:58)

So, as I mentioned, each step and each arrow along the causal pathway, it's explicitly rationalized by articulating the evidence base for the hypothesis. The rationale isn't obviously right within this visual visualization of the theory of change, but the text that goes along with this theory of change visualization includes that evidence base or that well-articulated hypothesis. Next slide.

Mahua Mandal (00:35:29)

When is a theory of change developed and used? Ideally, a theory of change is developed during the design phase of an intervention and in collaboration with stakeholders. This is what has generally been done for the MOMENTUM projects. For monitoring and evaluation of complex interventions though, you need additional theories of change, often. You need more narrow or more targeted theories of change to monitor and evaluate certain aspects of the project.

Mahua Mandal (00:36:04)

In this cycle, which I adapted from the USAID mission project design and implementation cycle, this shows that during project design on the right, during the overall project design, there is development of a theory of change. What we're talking about here for this session is that more narrow and targeted development of theory of change. So if you look at the bottom, it says activity design and implementation, this is where we need to develop an intervention theory of change to monitor and evaluate specific aspects of a large project or a large award. Next slide.

Mahua Mandal (00:36:49)

We're going to go through the components of a theory of change, and then the steps to actually develop the theory of change. Next. You'll find that different people mean different things sometimes when they refer to terms within a theory of change and I'll go through some of these differences. In the first set of components we have... And right now this is depicted in a very linear fashion, but we have all the way on the right, the impact, then in the middle, we have the outcomes and then on the left, we have the intervention or the activities. Next.

Mahua Mandal (00:37:28)

The impact is the ultimate change that the program may contribute towards achieving. This is sometimes also called the goal, for example, decreasing maternal mortality is an impact or a goal. Next. In the middle, we have the intermediate and long-term outcomes, and these are the intermediate and final things or outcomes that a program is theorized to change. Meaning a program may not actually see the impact in decreasing maternal mortality, but it may see things like increased delivery at facilities, and so these would fall within intermediate and long-term outcomes. Next.

Mahua Mandal (00:38:10)

Then we have the different components of the intervention, so the intervention includes the specific activities that the actual project or a portion of the project would implement. Next. We have assumptions, and as I mentioned, different people will refer to components within a theory of change differently. Some people use assumptions to mean external conditions that are beyond the control of the project. Next. This has the definition on the left. These are external conditions that the project doesn't have control over, but that influences the outcomes that are to be achieved. Next.

Mahua Mandal (00:38:52)

Then other people use the term assumptions to mean the rationale used to connect the activities to the outcomes. It's really referring to the hypotheses that they're pulling from and the conditions that need to be in place within the project, whether these conditions are in reference to the individuals or the activities. Next. Then we have something called the ceiling of accountability. Often visualized theories of changes won't include this, but this is often included in the text. So the ceiling of accountability is the level at which you stop using indicators or documenting success. Next. Often that ceiling of accountability is somewhere between the longterm outcomes and the impact. Depending on the project, it can actually be closer to the intermediate outcomes. Next.

Mahua Mandal (00:39:50)

This is again the Cross-MOMENTUM theory of change. Next. As mentioned, the impact here is the reduction in maternal, newborn child morbidity and mortality. Next. We have an array of long-term outcomes, which include scale up and sustained access to and equitable use of evidence-based quality information services and care and interventions. Next. We have an array of interventions here that are within three components, strengthening public and private health service delivery, addressing social factors and strengthening resilience. Next. Sorry, I missed the intermediate outcomes, that's what was next here. So I'll actually talk about the intermediate outcomes, which are in that middle box, they're associated with the different IRs. Next.

Mahua Mandal (00:40:52)

Then finally we have the assumptions, which in this case are external to the project. So the way we actually drafted the theory of change, the assumptions aren't necessarily about the conditions that we need within the project, but the conditions that are needed outside of the project to make sure that the outcomes lead to impact. Next. Okay, so now I'll go through the steps in developing a theory of change. I've broken this down into four steps and they're four overall steps, but because developing a theory of change is a very iterative process, these steps are not contained and sometimes two or more steps or portions of a step are being done simultaneously. You'll see that, again, these arrows keep coming back to earlier phases because often you really need to have that interaction with the documents and stakeholders to be able to finalize your theory of change. Next.

Mahua Mandal (00:41:56)

I'm going to use an example that I used last week to go through each step. This is the example of an intervention for orphans and vulnerable children in Botswana, where the mission wanted an evaluation that examined whether the project improved adolescent OVC's transition to adulthood. And they were specifically interested in the areas of HIV and health, economic strengthening, and education. The overall goal of the mission, the goal writ large of the mission, not only for this program, but for all HIV and OVC programs, was and is an AIDS-free generation. Next.

Mahua Mandal (00:42:38)

The first step in developing a theory of change is, after you have an initial conversation with people who know something about the program, it's really a review of documents. The documents can come in many different forms, sometimes if it's a broader theory of change, it can be the RFA or the RFP. It can be strategy documents. Sometimes there's needs assessments that were done, often work plans help. These documents provide an overview of how the program designers at the donor and the project level initially conceptualized how the intervention would work.

Mahua Mandal (00:43:20)

It's often broad strokes, especially with the documents that are created at the beginning of a program, and the emphasis is on the impact and some of the long-term outcomes. The documents may provide some insights into categories of interventions being designed, for example trainings or mobile service provision or education, but they don't always provide details of those interventions. Next.

Mahua Mandal (00:43:51)

As you're reviewing the documents, there's going to be many questions that arise, for example, what are the details of some of the interventions? How are the interventions linked to intermediate outcomes? And what are some of the assumptions of the stakeholders, including the donors, the intervention designers, and those who are the implementers? Some of the questions that arose from my review and my team's review of the documents for the Botswana evaluation, were really focused in on which components of the intervention was the mission most interested in evaluating?

Mahua Mandal (00:44:31)

For example, some of the components were around developing and implementing policies and strengthening the capacity of organizations in the community, which is a broad question. Then there were other components that were much more focused on traditional service delivery, such as training and counseling and testing. So a theory of change would look very different if an evaluation was focused on these broad aspects verse more of the traditional service delivery aspects, verse if an evaluation is focused on all of it. Next.

Mahua Mandal (00:45:08)

After reviewing documents and noting all of the questions, then it's really important to meet and communicate with stakeholders. When I say meet and communicate to stakeholders, in this step, these are really more mini meetings. They're through email or phone calls or in-person meetings, if it's safe to do so in these times, but these are not necessarily big meetings that are really formal. The meetings and communication occur with the intervention designers, those who are starting to implement it, including those at the headquarters and field staff at all different levels. They include national government, local government officials, who the project is interacting with, and donors.

Mahua Mandal (00:45:56)

When I say donors here, I mean not only the donor who has funded that specific project, but it's often important to meet with donors even outside of those who's funded the specific project because donors often work together in other ways. Next. Generally you want to, of course get as much information as you can about each component within a theory of change, from all groups of stakeholders. For example, from the intervention designers, implementers, the government officials and the donors, you want to get all of this information in this first column. The impact, outcome, intervention, all the links, all the assumptions, the ceiling of accountability.

Mahua Mandal (00:46:44)

But I do want to point out that some stakeholders will have more information about the theory of change than other stakeholders. For example, intervention designers, often you'll be able to focus more on the links between that impact, outcomes and intervention categories. The intervention implementers will have a lot more information probably, than other stakeholders on the specific types of interventions that are either being implemented, or going to be implemented, including details such as the scope, the quantity, the people who are responsible.

Mahua Mandal (00:47:22)

The national and local government officials and the donors and funders will have information on the broader level, so around the assumptions, which in this case, I'm referring to as the external conditions, around the ceiling of accountability, what are you responsible for measuring? And of course, around the impacts that they hope to see. Next. Once you have those communications and the many meetings with the stakeholders, then it's time to start drafting the initial theory of change. As I said, this is an iterative process so you may have already started drafting a theory of change with communication, just from one group of stakeholders, and are waiting to have communication with another group of stakeholders.

Mahua Mandal (00:48:16)

When you start drafting the initial theory of change, you want to start with the impact and the long-term outcomes and the links between the two. You want to start with those usually because they're the most straightforward. It's important to work on the most straightforward components of a theory of change, because these are most likely to be agreed upon by all stakeholders and they're least likely to change, at least not in a big way. Once one or more components of a theory of change have been on pen and paper and agreed upon, then these components can act as an anchor to help conceptualize, discuss and revise the rest of a theory of change, which is often more complex and nuanced.

Mahua Mandal (00:48:58)

When you're working on the more complex components of the theory of change, these might be things that are less defined or least well-defined. Things such as community mobilization, partnership strengthening, supportive environment. Sometimes different stakeholders have different definitions of these and sometimes these aren't conceptualized in a very clear manner so they're more difficult to put in the theory of change. Next.

Mahua Mandal (00:49:31)

Going back to the Botswana evaluation, when we developed the theory of change, we started with the desired impact, which again writ large, was an AIDS-free generation. That was easy, everyone agreed to that. Then we noted the categories of outcomes that would lead to the desired impact. And again, this was the most straightforward part because the evaluation questions were focused specifically on improving outcomes within HIV and health, economic strengthening and education.

Mahua Mandal (00:50:00)

You can see that we don't even, when we started the theory of change we didn't even have details about these outcomes, but we did start outlining, okay, these are the three broad areas, improvements in these three broad areas are going to lead to an AIDS-free generation. You'll notice here that there's double-headed arrows between each pair of outcomes, and that's because the OBC program was designed with the hypothesis that positive outcomes in one area would lead to positive outcomes in another area and that all of the outcomes were worked together to reduce HIV AIDS. And this was also backed by studies that were done in all three areas. Next.

Mahua Mandal (00:50:44)

So here is one of the early drafts of the full theory of change. I left out the goal from this visual for the sake of space, but that goal would be on the right side. But you can see here the three outcome areas on the right with some more details, the intermediate outcomes in the middle, and then the interventions on the left. Next.

Mahua Mandal (00:51:12)

So after you've drafted an initial theory of change, then it's the step to share the draft with stakeholders. And in this sharing of the draft, ideally you would hold a bit more of a formal meeting and get as many stakeholders in a single room as possible. And the point is to emphasize that the theory of change should represent what the stakeholders envision and what they are hypothesizing for the impact ,outcomes and interventions. So during this meeting, you usually present all the components in the draft theory of change, as it was initially understood by the team and by the stakeholders through review of documents and the previous communications and discussions. And in this meeting, it's really important to ask questions. So some of the questions that need to be asked include, what components of the theory of change need refining and revisiting? What's missing? Did the links between the interventions out from an impact makes sense? Are there additional connections not documented? And are the assumptions being made realistic? Next.

Mahua Mandal (00:52:25)

One of the most important parts of meeting with stakeholders, whether it's in this big meeting or again, iteratively through email communication, phone calls and smaller meetings, is unpacking that black box of how interventions lead to outcomes. And what's most important here is defining ambiguous terms and getting as specific as possible. Next.

Mahua Mandal (00:52:51)

So again, going back to the Botswana example, you'll see the initial draft theory of change, and there's a question mark on the bottom row of the intermediate outcomes. There is a box called supportive environment, and this was an intermediate outcome that was mentioned by all the stakeholders. And it came up a lot through document review, but there was little information about what actually would lead to a supportive environment. There was documentation that a supportive environment would lead to other things, including the outcomes, but it was very challenging to see which of the activities were actually going to increase the environment being supportive. So when we met with stakeholders, we had to really get specific about what that meant. Next.

Mahua Mandal (00:53:46)

So we asked, how will a supportive environment lead to stated outcomes? How is a supportive environment defined? What activities lead to a supportive environment? Who will conduct them? What are the tools and resources? How often, and in what settings? And this level of detail is often needed to really be able to make sure that ambiguous terms get grounded in something that people are really able to visualize in their heads. And then also, what other components of a supportive environment intersect with in order to lead to outcomes. Next.

Mahua Mandal (00:54:27)

So with the details of these types of questions answered, then you go back with your team, you revise the theory of change based on these meeting with stakeholders. And again, as an iterative process, you continue communicating with stakeholders, you continue reviewing documents and you continue sharing updated drafts of the theory of change with the stakeholders. Next.

Mahua Mandal (00:54:53)

So here's the final theory of change. Again, going back to the Botswana example. So you can see, we made explicit in this final version the activities that were theorized to lead to a supportive environment. And so in this theory of change, supportive environment isn't intermediate outcome, it is not something... In other theories of change you'll see something like supportive environment as running along through all of the project. And so it's not necessarily within one of these arrows, it's not within the causal pathway. But here are the stakeholders really wanted to make sure that it was in the causal pathway, because there were activities such as improved parenting skills and distribution of food baskets that they believed and hypothesized would increase the supportive environment. And supportive environment was defined as an environment where not only do people provide support, but there's also support provided by goods.

Mahua Mandal (00:55:54)

So really, what they meant by a supportive environment were things like structural factors that helped youth. So in this visualization, right in our visualization, we didn't include the assumptions, but we did include them in the text, and they included things like partner engagement and coordination, consistent funding. And again, here we didn't include the ceiling of accountability and the visualization, but in the text we did include indicators for all of these long-term outcomes for each of the components within HIV and health, economic stability, and education.

Mahua Mandal (00:56:35)

So some key takeaways from developing a theory of change, evaluations of all complex interventions. So complex evaluations and complex monitoring and evaluation should start with the theory of change. Developing a theory of change of complex evaluations and MNE is an iterative process, it is more of a mix of a science and art, it's not an exact science. Multiple stakeholders should be engaged in the development and finalization of a theory of change. And there's no rigid structure for a theory of change. So as we had seen, arrows can be bi-directional, there can be feedback loops, but some components are recommended to be included in a theory of change. Next.

Mahua Mandal (00:57:28)

So I am going to hold to take questions. If there are any questions that come up, I think what we're going to do first is take a break. So I'm going to hand it back to Emily so she can talk about the logistics of the break and next steps.

Emily Stammer (00:57:46)

Great. Thank you, Mahua. So thank you for your session, that was really interesting. I'm sure folks have questions, but we wanted to give you a break to get your questions together. We're going to break for about four minutes, which means we will be back at 9:04 Eastern time. So go ahead, do what you need to do for about four minutes. Get your questions together and we will come back and answer those, and then jump off into breakout rooms for a little bit, before I talk more about adapting CAM approaches for our context. So see you all back here at 9:04.

Emily Stammer (00:58:31)

All right. So that is our four minute break. Does anyone have any questions for Mahua about her section? You can enter them into the chat or feel free to come off mute and ask any questions you might have. Anybody? Doesn't look like it. If you do think of a question and you want to enter it into the chat, we can answer those a bit later. I think what we're going to do now is we will break out into breakout rooms. I'm going to put the questions. Let's see, let's go to the next slide. I'm going to put the questions in the chat so that everyone can see them in your rooms.

Emily Stammer (00:59:48)

We're going to do a breakout discussion in groups for about 15 minutes. Here are some of the questions we want to ask you to introduce yourself, just briefly. Talk about whether or not you've worked on a TOC before, how the process went, maybe what you would do differently. And then maybe talk a little bit about how we might use theories of change for activities or interventions at the sub award levels, at the lower levels, and whether or not you plan on developing them for these activities. So let's see, let's go ahead and break out into our rooms. You will have a facilitator in each room, they will self identify. We also have a Francophone room again. Let's go ahead and do that, and we will come back and do a little bit of a discussion in about 15 minutes.

Lucy Wilson (01:01:01)

Okay people. Great. So welcome back from the breakouts. We'd like to take just a few minutes to hear from you all, to see what impressions and interesting ideas came up during our breakout conversations. So if you'd like to share an interesting tidbit that came up during the conversation that you had in your group, I ask you all to take a minute and unmute and share something that came up in your group. I'll start by saying, in our group we had a lot of people who had done theories of change, both really seasoned M&E experts, who've done many of them. As well as some program staff who've been participated in them from the intervention perspective.

Lucy Wilson (01:01:49)

And I was happy to hear that theories of change had been developed both at the larger award level and at the lower intervention level, but often those looked more like log frames, their logic models at those lower levels, but there was definitely interest in doing them at the sub award level. Anybody else want to share anything that came up either from my group or from one of the other groups, feel free to either raise your hand or just go ahead and go off mute.

Laura (01:02:28)

This is Laura. On behalf of the Francophones, we had a really interesting discussion. We had a mix of people who had practical experience in developing theories of change versus classroom or theoretical experience in developing them. And not necessarily in the context of a project. But two questions that came up were, one was really struggling with understanding on a practical level how to use a theory of change after they're created, and also the frequency with which you ought to go back and review and potentially revise the theory of change, and how soon is soon enough and how much time should you let pass over?

Lucy Wilson (01:03:20)

Yeah, those are great questions. And I think that second one definitely came up in our group as well. The thought of, do you go back and update it formerly mid project?

Soumya (01:03:34)

So a couple of things came up in the group that we're talking in. This is Soumya. And I think overall people appreciated the value of the theory of change in the process, but the way it works for many of us, it's not always realistic that you get all the stakeholders around the table in the beginning, while you put that initial version, it's you conceptualizing based on documents that are out there and come up with a version of the theory of change and potentially there's an opportunity to change that later. Two other things came up was, sometimes it's complicated, you want to have gender inclusion in your theory of change, trying to find a good fit for it in that theory of change is hard. You have a project that's has a short timeframe, how much time do you have to really iterate?

Soumya (01:04:22)

You need to move on and plan your activities going forward. And where exactly you have disadvantaged populations, or you want to include gender and finding the right place in the theory of change, putting it in there is sometimes problematic. The other thing that comes up is how complicated do you want the theory of change to be? If you are putting interventions on the ground, you do need all those complicated relationships to really understand how things work. But do you want to present that? Should you have two versions of theory of change?

Lucy Wilson (01:04:58)

Yeah, that's some great points. And I think in our group we talked about, what do you put on paper versus in the narrative versus on the diagram and trying to keep the diagram simple, but being able to use the narrative as a place to put more detail in. Other comments from the groups?

McCullough (01:05:22)

In our group, this is [McCullough 01:05:24]. We had probably a little more than half of group participants say they had been involved in developing a theory of change, or maybe it was half of us. An interesting point that came up was the fact that sometimes it's been viewed that the theory of change is kind of something in the checklist to mark off, and that it's not always seen as a project document or something for the projects, but it's sometimes seen by other staff as something solely for monitoring and evaluation. And the fact that participants have done work to try to make sure that the project understands that it's really for the project itself, and to help guide the activities that the project is doing so that they can lead to the outcomes and that it shouldn't be owned only by the MNE team, but it really should be owned by all of the project staff.

Lucy Wilson (01:06:30)

Yeah, that's a great point. I think of causal frameworks and theories of change is really great tools for having a really strategic approach to project planning and design, because you may be choosing to implement interventions that sound fun and innovative, but don't actually get you towards where you're going. And having a causal framework or theory of change can help you identify where that might be happening. Great. So I'm going to move us on to introduce Emily, who will talk about adapting CAM to context and developing an implementation plan. Over to you, Emily.

Emily Stammer (01:07:11)

Great. Thanks Lucy. So next slide, please. We are going to talk a bit about adapting CAM approaches to our context, that's where we're going to start, and why we should do it. So complex environments like those we're working in with the momentum suite of awards, they're going to require not only adaptive programs, but we need to also have adaptive MNE. And we should adapt to these approaches so that they can be used at all levels. So we're talking about from the award level all the way down to the teeny tiny activity level, like a workshop. And we'll get into options for adaptation next, but when we do adapt we should keep a few things in mind. So which aspects of the approaches are most relevant, which we really want to keep in there and should be maintained. And which aspects of the approach are really integral to the rigor. And Lucy talked about how we do that a bit earlier, and we should keep that in mind as we're moving forward. Next slide.

Emily Stammer (01:08:15)

So what are some options for adapting CAM approaches? This slide is going to show a list of some of the ways that you can adapt, but it certainly isn't an exhaustive list. One way is adapting your approach to the size needed, and as you'll see with the workshop outcome map that we'll talk about in a bit, we're adapting it to use for this workshop. So it's at a super low level, but we could use it for an intervention or even to map award level outcomes.

Emily Stammer (01:08:46)

The next is related to the terminology, a lot of these CAM approaches were developed with really specific terminology, often to distinguish how they're different, how to define something differently from a conventional approach. But the added jargon often makes what's already new and different, even more complex to understand, especially for people who aren't super deep into it, so anybody who has an NME in their title. And I can tell you, I personally get really hung up on terminology and jargon and that kind of thing. So the flexibility here has been really essential for me to better understand CAM approaches, and for them to feel a bit more approachable. For example, outcome mapping uses the term boundary partners, but calling them partners or stakeholders works just as well.

Emily Stammer (01:09:39)

Another option, a way you can adapt is by integrating approaches into your existing systems for collection or reporting. There's no need to necessarily recreate the wheel if you have existing systems. For this workshop, we'll be incorporating most significant change into the feedback surveys that we always do after an event. Another example would be integrating something like Sentinel indicators into your routine data collection. Another option for adaptation involved your method for adaptive learning. So how you incorporate feedback and revise as part of the CLA cycle can be changed to suit your needs. If you already have a system for adaptive learning, you don't need to use the one that's necessarily built into the approach, if it has one built into it.

Emily Stammer (01:10:25)

And finally, you can mix and match. Again, we use this workshop as an example, we've incorporated components of outcome mapping, pause and reflect and most significant change. And they aren't all being applied exactly according to the book, but we've pulled out the important parts and work to maintain the rigor, which I'll talk a bit about later. So now I'm going to go a little bit more into depth about the approaches we're using for this workshop series. Next slide.

Emily Stammer (01:10:52)

So first, so adapting for the workshop. First off, why do we need to adapt? Well, this is a really small activity in the scheme of things, and it has a short duration, so we needed to make the methods fit our purpose. The three methods and approaches that we're going to use are, most significant change, pause and reflect, and outcome mapping. For most significant change, as I mentioned earlier, we're going to be incorporating that, or components of that into the survey you receive after the workshop ends. Let's be honest, we know that you, our stakeholders are busy, and doubt that many of you are going to want to sit with us for an hour for a facilitated session after the workshop series. So we're going to incorporate it to the best of our ability into a pre-existing data collection method, these surveys that we do.

Emily Stammer (01:11:45)

So that's one example of how we'll integrate CAM into established MNE feedback structures. We're also doing pause and reflect, so pause and reflect is used during and after each session to get at what went well, what didn't go well, what we could change for future sessions. For example, we tried to cut back on presentations this week in order to slow things down and allow more time for engagement and discussion in the breakout rooms, so we're trying to feed that back in. And then outcome mapping, which I'll spend more time on. We started using outcome mapping during the planning period for the workshop to think through our objectives and set progress markers to indicate achievement toward the objectives we hope to achieve. And I'd like to talk through that process a little bit more now. So next slide.

Emily Stammer (01:12:40)

Okay. So a quick overview on outcome mapping, it's a methodology for planning and assessing projects that aims to bring about real and tangible change. So I'm not going to go super into depth with all of these steps. I want to give you a brief overview before we look at the outcome map that we created for the workshop. If you look at the image here, you can see that there are three overarching stages or phases. You've got your design or your planning phase, monitoring and evaluation, which feeds back into the design or planning, so yay, adaptive learning. In the design or planning phase you're thinking through the end goal from a super high level and getting consensus from your stakeholders. From there, you can think through what intermediate changes need to come about in order to achieve that end goal. You're also identifying who needs to be involved, your stakeholders or boundary partners, in order to achieve your end objective. In phase two, you're monitoring your progress, largely through what outcome mapping refers to as journals, which we'll talk about how we've adapted later.

Emily Stammer (01:13:51)

And then your stage three is evaluation, where you do a more in-depth review of progress document and use that information to feed back into your project directivity. So we can put this in the chat or raise your hand. This sounds pretty familiar to everybody, right? When I learned about it at first, it sounded like another causal framework to me. And it mostly is, particularly for this workshop, which is a pretty small activity. It doesn't have a ton of nuanced behavior change or intermediate steps that can't always be well quantified using indicators. So how is it different? Next slide.

Emily Stammer (01:14:35)

Well, to begin with outcome mapping, when done correctly should build on a causal framework to identify potential outcomes outside of the normal puzzle framework, which we'll talk about that in a minute. It should also be more participatory than a traditional causal framework, getting input from stakeholders from the beginning to create the map, which is part of the reason we're having everyone look at our framework next to provide any input. It's also visual, progress markers are grouped in a way that it tells more of a story about how change comes about and how outcomes are achieved instead of just sort of a random placement of indicators.

Emily Stammer (01:15:13)

Outcome maps are optimistic. So with theories of change and causal frameworks, you really want to be realistic, not necessarily optimistic, right? If you put things in your framework that are optimistic, if you're like me, you worry that you're going to be held accountable for achieving them, right. With outcome mapping, and I'll show you when we get to the next slide, the line of accountability is different and varies based on the outcome, which frees you to think a little bit bigger with possible outcomes. And that's really one of my favorite things about the approach. Because I am not an optimist. As anyone who knows me, I am a realist at my core.

Emily Stammer (01:15:52)

So this allows me to think a bit differently, but also I'm an M&E person. So in order to keep things from going completely off the rails and having all kinds of wild things in the outcome map, another unique part of it is that you can categorize your outcomes or process markers with the likelihood of achieving them by indicating which you would want or expect to see, like to see, and love to see. So realistic, optimistic, and idealistic. Additionally, outcome mapping also includes both strategy planning and results monitoring into one activity instead of doing them separately. You also try to capture unintended and unexpected outcomes in advance. Like I said, your line of accountability is a bit different. So you can include things that might happen without feeling like you're necessarily beholden to achieving them.

Emily Stammer (01:16:49)

And then other causal frameworks, unlike other causal frameworks, your outcomes are not made up of traditional indicators. They're more flexible. And while they do need to be documentable, they can be more loosely documentable. You don't necessarily need super quantifiable data to back them up. Like for this workshop, one of our progress markers is the participants are more confident in using CAM. And while we could ask about this and we may ask about it in a survey afterwards, also if someone just mentioned in a positive reflect session, that they feel more comfortable using CAM, we can use that as our documentation. We're not necessarily restricted to smart indicators here. Right. Which is kind of a nice difference.

Emily Stammer (01:17:39)

So as I alluded to a little bit earlier with the visual piece, these progress markers make up a story of change versus standing alone like an indicator, like the example of the progress marker looking at confidence using CAM, this allows you to use smaller, more nuanced change in the map to include more smaller and nuanced change in the map that you might not be able to measure in traditional ways.

Emily Stammer (01:18:06)

So next slide. So now I want to talk through the CAM workshop outcome map. And let's see. I'm also going to send a link out into the chat to a Google jam board that we've set up for you to add any comments you might have now, or after the session. You can take a look at it, but we would love your feedback on it. So let's look at the activity. We're going to start with our activity, our outcome domains, and progress markers. So let's look at the activity goal and then the outcome domains and stop there. Okay. So next Sammy. Oh, I just can't really see them. Can you? What I have down there is the activities are a virtual workshop with didactic and interactive components. There's a resource collection and ongoing TA.

Emily Stammer (01:19:02)

Okay. So next our activity, or goal is improved progress toward the MOMENTUM goal. All right. So next. Okay. So these are our outcome domains. Now M&E people I'm going to ask you to engage in the chat now. So get ready. Let's go ahead and number these outcome domains. Sammy, next. There we go. Okay. So we've numbered them one to five. Now take a look at these outcomes domains. If you're like me, some of these are making you very uncomfortable. Can you put in the chat which of these outcomes would make you feel uncomfortable putting in? Just add the number in. You've got knowledge and understanding of CAM, improving participants ability, expanding participants networks, increasing use of CAM within MOMENTUM award and improving MOMENTUM. Yeah. Okay. Yeah. So number five, that one makes me very uncomfortable. Five and three. Okay.

Emily Stammer (01:20:19)

Yeah. I would feel pretty uncomfortable with a number of these just because... And I'll tell you, I was pushing back on adding numbers four and five as early as this week. Lucy really had to push me to do that. So, okay. Next, Sammy. This is why I felt more comfortable doing it. With outcome mapping, you're able to indicate the likelihood of success with progress markers underneath each one. Is it a given that the workshop resource collection or ongoing TA are going to improve the importance of MOMENTUM award? Absolutely not, but they might. And by including these optimistic and idealistic outcomes and progress markers in here, we're showing you, the participants and the donors exactly where we would like this activity to go. And it's something we could use to show where things might go over a longer period of time if we continue this activity and into the future.

Emily Stammer (01:21:30)

I should note that we did include some outputs in this version. While that may not be ideal for all activities and projects, we thought that the outputs were pieces that we wanted to capture for this workshop. Anyway, I need to move on from this. But let's see, let's put the jam board chat in with these, the jam board link in. You're welcome to go in there and add any comments that you might have moving forward. So we'd love your feedback on this. If we're missing things or yeah, if you'd add things, or if we should take things out, please feel free to provide comments there. Okay. Next slide.

Emily Stammer (01:22:11)

Okay. So I put the outcome mapping steps in a graphic on this slide again. It's a little difficult to see. We're not going to again, go into the detail, but I want to talk to you a little bit about how we modified things for the workshop. So to give you an idea of timing, like I said, we decided to use the outcome map basically after the first draft of the outline for USA was put together. But that outlined had included a lot of the information that you'd use to plan any activities. So we were able to pull from it to populate some of the map. So the vision and mission were generated based on things we already had in a workshop outline. The strategy maps are basically detailed descriptions of what the program intends to do or how the program will work with or influence the partners to achieve change, not just in the workshop, but some of the external support we plan on providing as well.

Emily Stammer (01:23:05)

All of that was pulled from our workshop outline basically just that we'd provide external TA on CAM topics and make resources available. We also modified some of the terminology to better suit our purposes. Like I said, that's a real area that tends to get me. Outcome challenges are defined as the desired change in the behavior relationships, activities, actions of the participants. And we changed the terminology to outcome and names, or just more generally the objectives of the workshop. Finally, we modified the format of things to better suit our activity.

Emily Stammer (01:23:38)

Outcome mapping suggests a variety of different types of journals to document internal and external progress as well as performance and adaptive learning. So for the outcome journals, which attempt to measure progress achieved by participants like your experiences as we go through the sessions, what you've learned, all of that. We'll use the survey at the end to get a better understanding.

Emily Stammer (01:24:04)

Strategy journals are supposed to focus more on internal progress, which are like output, sessions held, participants attending, all that, which we'll get from sort of the standard metrics that we collect from each session. Anyway. And then finally the performance journals examine how the project or workshop in our case is doing in relation to its plan strategies and approaches and how we're learning from our experiences as we go. So for this, we're using those weekly pause and reflect sessions among the participants and then among the organizers after each session to help gauge our performance. So quickly, I want to just stop here and ask if there are any questions about the outcome map. I know that was a quick run through. Lucy, and I could probably take a few questions about it now, if you have them.

Karen (01:24:0458)

Hi, this is Karen. I just, I wrote this on the jam board, but I was curious to hear a little bit more about, I worry with some of these approaches that they become sort of self fulfilling prophecies, like we're identifying what we would like to happen. And then looking for evidence that, that happened opposed to being able to more objectively document what hasn't happened and why as well, or things that have sort of deviated from what we planned. And so I wanted to know if you could just talk a little bit about the flexibility of using these and how they can kind of capture all of that.

Emily Stammer (01:25:37)

Sure. Lucy, do you want to take that one?

Lucy Wilson (01:25:40)

Sure. That's a great question. And Emily had actually brought it up too. Where do we put the things that may not be positive? And I think sometimes you may end up with a second map that you keep in your back pocket to look for the unanticipated negative findings. But a lot of what the outcome mapping is, is this kind of optimistic, looking for the things that are positive outcomes that you may not have anticipated and trying to think in advance, what might those be. It helps your team work towards things that they may not have been able or may not have sought to achieve without that kind of extra encouragement, by putting it on the outcome map.

Lucy Wilson (01:26;26)

They may be able to leverage opportunities that come up in the moment to push towards a change. That's one of the ways that I see it as really strategic planning. And I think again, to get to the point about what's more realistic or objective is where you do really balance it with other approaches. So you aren't going to use outcome mapping totally on its own, but as part of a larger M&E plan that'll get some of that more objective content as well.

Karen (01:27;03)

Great. Thanks.

Emily Stammer (01:27;10)

Okay. If there are more questions, feel free to put them in the chat. But I'm going to move forward. So document, in terms of maintaining the rigor, the urge to adapt and to skip some of the documentation may be strong, but this is a really important step. It's not really just for you, yourself and for reproducibility in science, but honestly, it's for other people to learn from. This is just a slide to basically say, don't let the documentation piece of things drop if you do adapt. So how do you document your CAM approaches and your adaptations? Next slide.

Emily Stammer (01:27;58)

No matter what you call it, some written record of your objectives and what you intend to do and how you intend to achieve your objectives is helpful. Whether that's implementation plan, protocol, outline, but it's a joke, poem, Limerick, novel, just put it somewhere. And this not only helps communicate with stakeholders, both your internal and external stakeholders about what you plan to do, but also like all implementation plans and similar documents that helps you think through what you want to do, which methods would work best and how to adapt them.

Emily Stammer (01:28:29)

I spoke with someone a while back about CAM approaches for a project. And I said, we need to figure out what we're doing first and then how a CAM approaches fit in not the other way around. And I think that's completely right, like any CAM or any M&E approach, we should be outlining what we want to do, and then figuring out how we plan to measure it. And having your plan written out, and then looking through to see where you have gaps with traditional approaches and how CAM can fit in, or where CAM approaches are preferable to traditional approaches, or where you can combine them is really your best bet. Next slide.

Emily Stammer (01:29;05)

So very quickly, when we talked about the resources needed for CAM, Lucy included this table in the report, which I think is really useful. I'm not going to spend much time on this, but it's basically, when you are planning for CAM these are some things you really need to take into consideration, the skills and the resources needed, the intensity, the LOE required, and the type of engagement. So with that, I am going to close my session. Let's go to the next slide. We're going to do a wrap up quickly and then do a little pause and reflect. So next slide.

Emily Stammer (01:29;49)

So for today's main takeaways, CAM and traditional performance M&E are built on the same foundation, but the CAM approaches can be used to answer slightly different questions and may require different skillsets and perspectives. Qualitative inquiry, facilitation, systems thinking, and adaptive learning are few skill sets and perspectives that are relevant to many of the CAM approaches. Strong theories of change are essential for CAM. Theory of change development is iterative with multiple steps. CAM approaches are adaptable to your context and we're using three approaches for M&E of this workshop alone. So pause and reflect, most significant change, and outcome mapping. Next slide.

Emily Stammer (01:30:33)

So just a reminder next week's session is Wednesday, June 30th. We'll do a approach, a deep dive into pause and reflect. We'll do an introduction to pause and reflect, and then have more examples of CAM and practice, a Round Robin with momentum colleagues. Don't forget to register. Sammy has put the link in the chat. So please register for that. Let's see. And I think, yeah, that is it. So I'm going to turn it over to Mahua now who is going to do our pause and reflect activity.

Mahua Mandal (01:31:15)

Thanks Emily. So we have just a few minutes left to do a quick pause and reflect for this session. Here's a quick graphic. I'm not going to go through this in detail, but there's different types of pause and reflect activities we can do. And we're going to use some of the questions that come out of appreciative inquiry for this specific pause and reflect. Next, Sammy. But so Sammy, if you can put the RiseUp link into the chat. We're going to use the RiseUp Pad again, to do this pause and reflect.

Mahua Mandal (01:31:55)

So let's take a minute, or rather 30 seconds, because we're really short on time, to think about the first three questions. We're not going to go through the last question here. So the first question is what went well? So think about today's session and the difference mini sessions within it, as well as the breakout session. What could we do in the following session? So this is the idealistic ideas, right? It's the big ideas. Don't be constrained in your thinking of what could we do. And then the last question is what should we do in the following sessions? And so this is more of the, I guess what we would say is more realistic. So we're going to just take 30 seconds to let you guys start writing this and I'll start reading some of the responses.

Mahua Mandal (01:32:57)

Okay. So, so far what went well, some of the responses we have is that the presentations are well organized and clear. It's a good mix of presentations and engagements, the polls, the RiseUp Pad, and discussions. So those are things we did try to think last time of how to make the sessions a little more interactive. Can be of course challenging because it's online. Someone mentioned that they're useful practical examples. But in terms of what we could do in the following sessions, yeah, there are a couple of things around providing more real world examples and opportunities to think about how to apply these ourselves, doing some exercises, perhaps a case study. So these are more about the actual application. The person writing about case study, still writing.

Mahua Mandal (01:33:56)

And then if we can scroll down, since we only have a minute left now, what should we do in the following sessions? Someone wrote, they think that the format is working really well with the sessions, and breakouts, and interactions. So that's a little bit more of what's going well. If folks have ideas about what should we do, and I think that the difference in the questions, what could we do and what should we do can sometimes overlap. Again the, what could we do is the thinking really big, kind of in an ideal world. And then what should we do is little more, given the practicalities of doing an online session. Sammy, if you could scroll up one more time, see if we have anything else here. Okay. Looks like their writing slowed down and we are exactly right at 10 o'clock now so.

Emily Stammer (01:35:00)

If folks want to keep filling this out, even after we end, I think that's fine. We'll take a look at these when we do our own pause and reflect, our internal pause and reflect tomorrow.

Mahua Mandal (01:35:15)

Okay, great. So you can continue writing even after we end the session. It is 10 o'clock right now, 10:00 AM Eastern standard time that is. So thank you all for coming to the session today, as Emily mentioned, and we have the registration in the chat link next week, same time is the next session. Emily, Lucy, do you have any last words to share?

Emily Stammer (01:35:45)

Nope. Just thank you all so much for joining us. Thank you to the presenters. And we look forward to seeing you all next week.

Lucy Wilson (01:35:53)

And thanks to our background team, Sammy and Devin.

Emily Stammer (01:35:55)

Yes, for sure. Thank you. Thank you.