Using Visual Outcome Mapping for Participatory Monitoring and Evaluation

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Background: World Vision Australia CDEP Participatory Monitoring and Evaluation Project

- World Vision Australia has been contracted by the Department of Families, Housing, Community Services, and Indigenous Affairs (FaHCSIA) to undertake a Participatory Monitoring and Evaluation (PM&E) project with five Community Development Employment Program (CDEP) providers in Australia

- The project involves trialling ways that participatory monitoring and evaluation processes and techniques could be used and adapted for the CDEP program

- Outcome Mapping is one of the tools we have used in the project

The Community Development Employment Projects (CDEP) program is an Australian government Indigenous employment program, currently funded and administered by the federal department of Families, Housing, Community Services and Indigenous Affairs (FaHCSIA).

The program provides training and employment opportunities in remote and very remote areas of Australia.

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Participatory Monitoring and Evaluation

"Development organisations need to know how effective their efforts have been. But who should make these judgements, and on what basis? Usually it is outside experts who take charge. Participatory monitoring and evaluation (PM&E) is a different approach which involves local people, development agencies, and policy makers deciding together how progress should be measured, and results acted upon." (Gujit and Gaventa, 1998: 1)

Understanding CDEP providers' work and projects

To support development of Participatory Monitoring and Evaluation systems we first needed to understand what CDEP providers do, why they do it and what they hope to achieve.

We wanted to do this using an approach that would:

- Find a **common language** for describing program theory
- Recognise **intermediate outcomes and progress towards desired change** – identifying the actors and relationships involved
- We wanted to look within the providers' **'sphere of influence'** – i.e. focus the monitoring and evaluation on things they could take action on, within their capabilities and resources

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Outcome Mapping

Brief definition of OM

- A participatory method for planning, monitoring and evaluation

- Focused on changes in behaviour of those with whom the project or program works

- Oriented towards social & organizational learning

OutcomeMapping
LEARNING COMMUNITY

Three key concepts in OM:

1. Sphere of influence

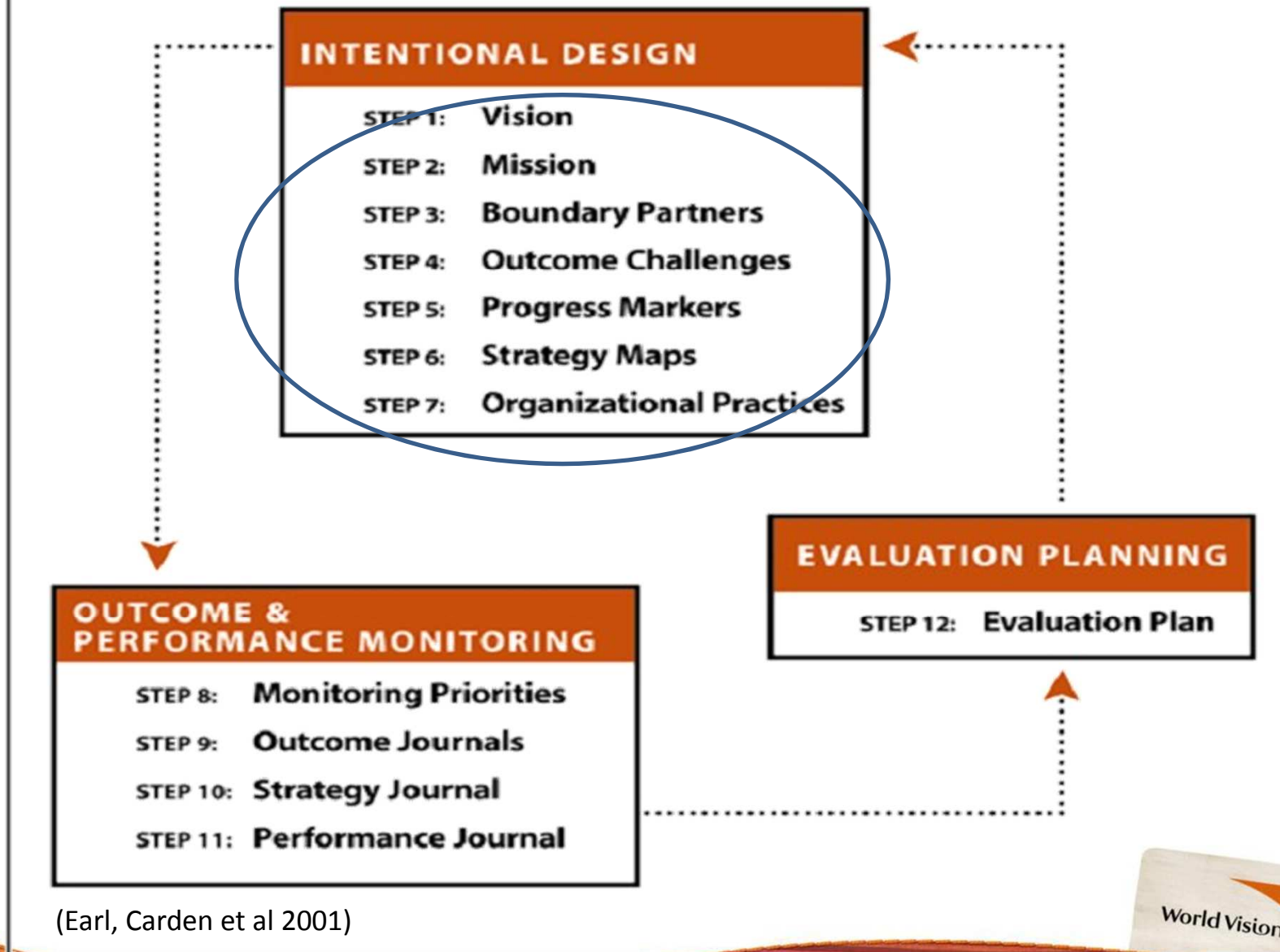2. Boundary Partners

3. Outcomes understood as changes in behaviour

OutcomeMapping
LEARNING COMMUNITY

(Hearn, 2011; Earl, Carden et al 2001)

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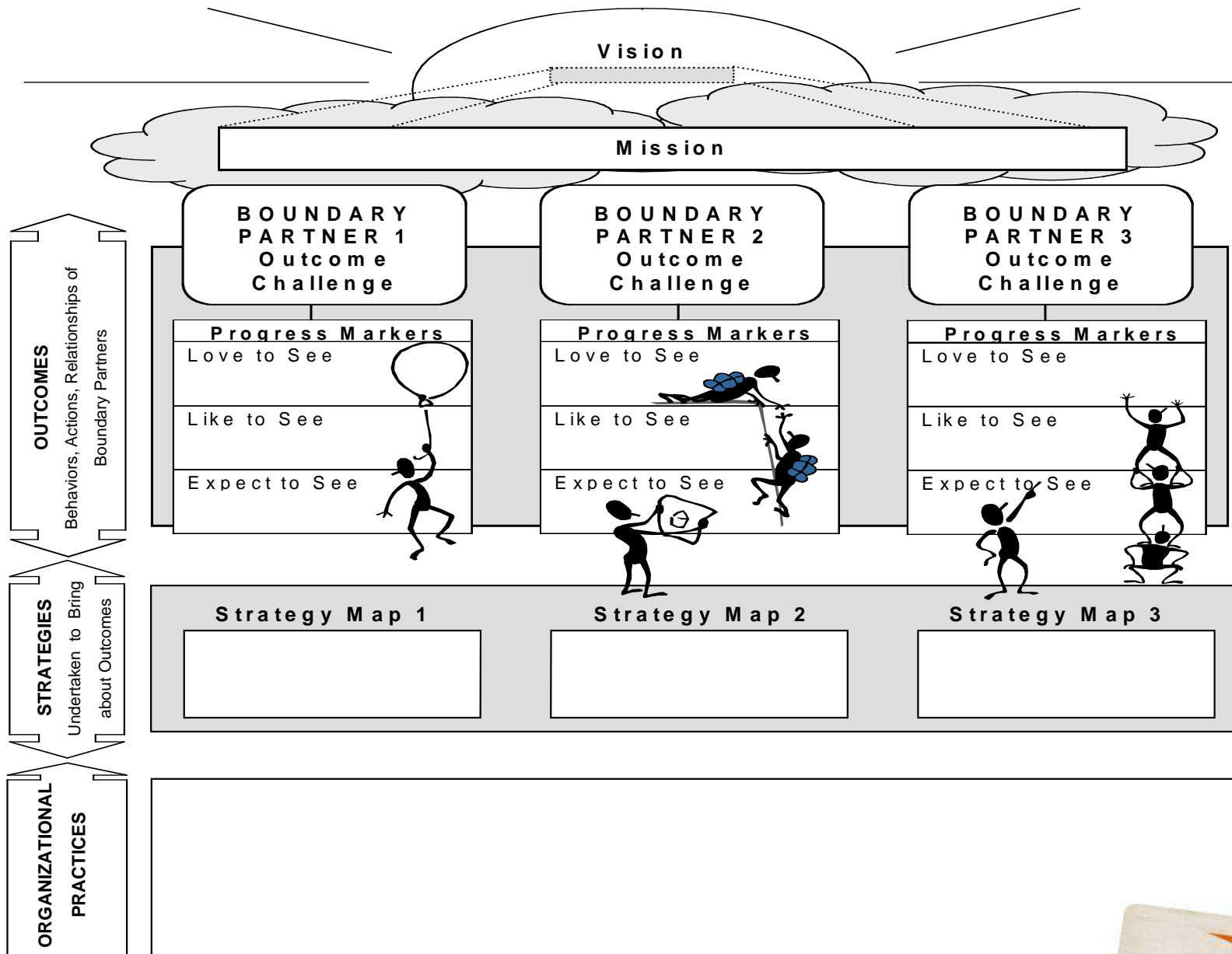THREE STAGES OF OUTCOME MAPPING

INTENTIONAL DESIGN

STEP 1: Vision
STEP 2: Mission
STEP 3: Boundary Partners
STEP 4: Outcome Challenges
STEP 5: Progress Markers
STEP 6: Strategy Maps
STEP 7: Organizational Practices

OUTCOME & PERFORMANCE MONITORING

STEP 8: Monitoring Priorities
STEP 9: Outcome Journals
STEP 10: Strategy Journal
STEP 11: Performance Journal

EVALUATION PLANNING

STEP 12: Evaluation Plan

(Earl, Carden et al 2001)

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V i s i o n

M i s s i o n

B O U N D A R Y **P A R T N E R 1** **O u t c o m e** **C h a l l e n g e**	**B O U N D A R Y** **P A R T N E R 2** **O u t c o m e** **C h a l l e n g e**	**B O U N D A R Y** **P A R T N E R 3** **O u t c o m e** **C h a l l e n g e**
P r o g r e s s M a r k e r s	**P r o g r e s s M a r k e r s**	**P r o g r e s s M a r k e r s**
Love to See	Love to See	Love to See
Like to See	Like to See	Like to See
Expect to See	Expect to See	Expect to See

OUTCOMES
Behaviors, Actions, Relationships of Boundary Partners

STRATEGIES
Undertaken to Bring about Outcomes

S t r a t e g y M a p 1	**S t r a t e g y M a p 2**	**S t r a t e g y M a p 3**

ORGANIZATIONAL PRACTICES

(Earl, Carden et al 2001)

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Visual Outcome Mapping: How we modified the 'intentional design' stage for use in our project...

The importance of language

Result
Output
Objective
Reach
Outcome
Activity
Stakeholder
Target
Goal
Indicator

- The technical language of evaluation can be daunting (Patton, 2001: vii) and exclusive

- Emphasis on terminology can restrict people's input into describing their project in ways that are meaningful for them.

- We noticed in commencing work with providers that we had to adapt to each other's language to understand one another

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Using everyday images and concepts
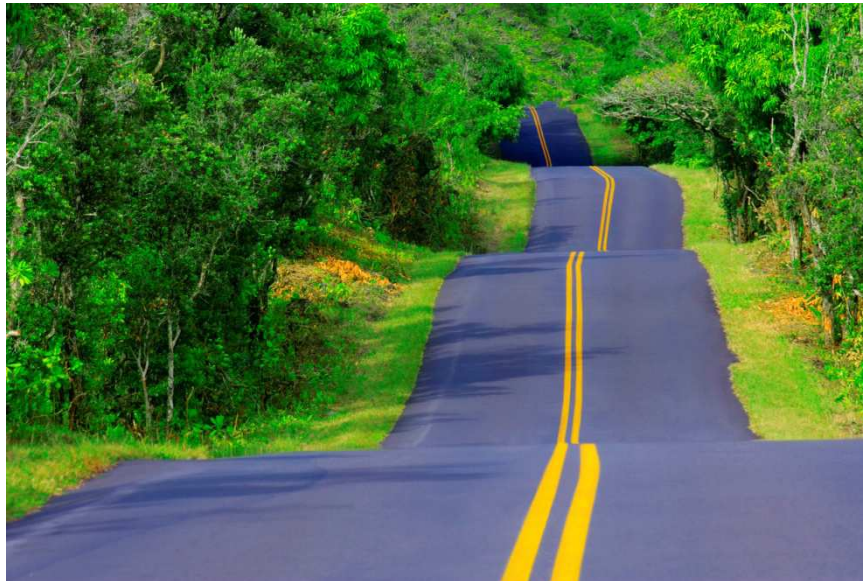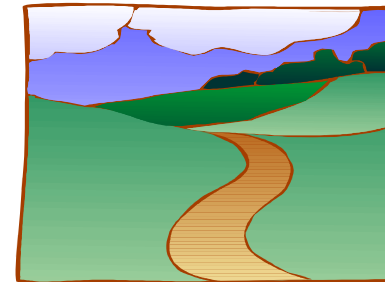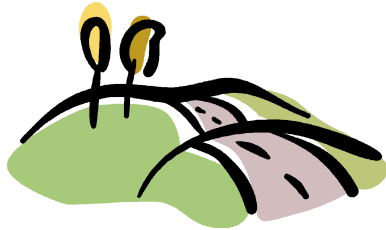
Representing desired outcomes as points along a road or journey towards success is an effective way to make monitoring and evaluation and program planning accessible.

E.g. www.littlefish.com.au
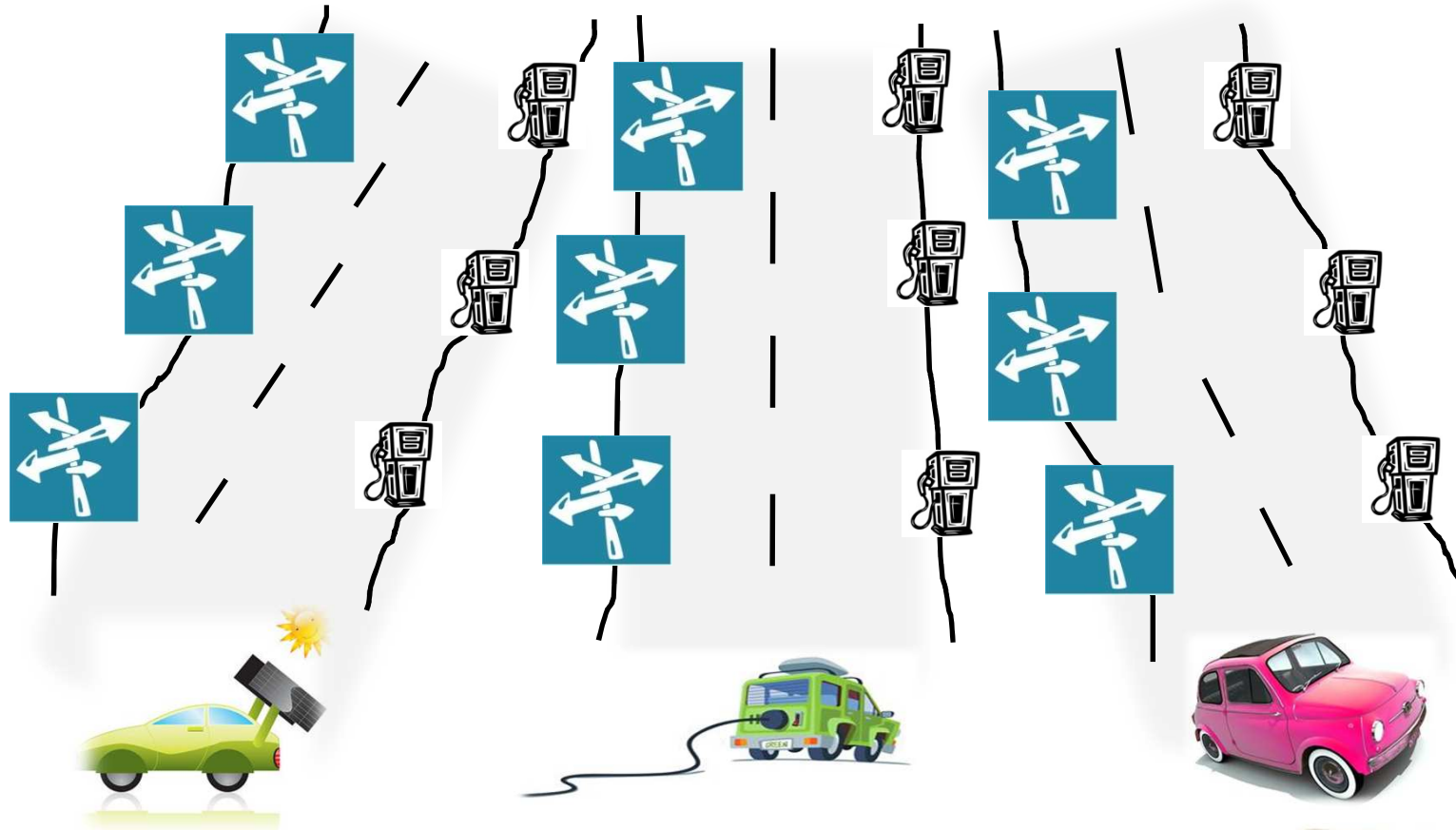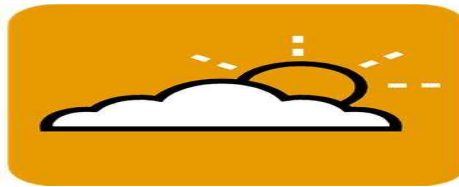
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Step 1. Vision

Imagine that the world has changed. The wellbeing of CDEP participants has improved beyond your wildest dreams.

What changes have occurred?
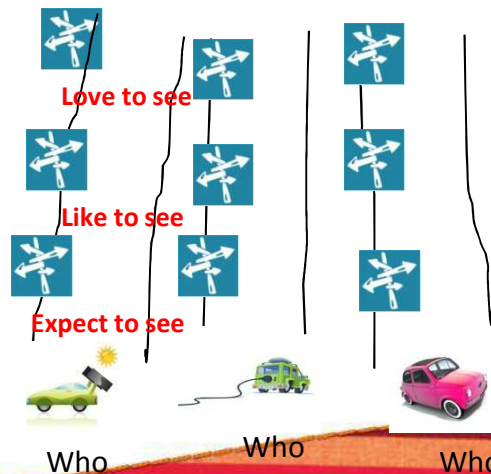
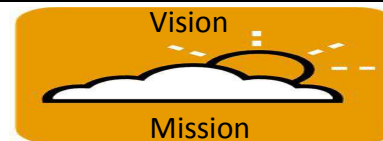Describe what this world looks like?

Step 2. Mission

The mission is that "bite" of the vision statement that your program is going to focus on...
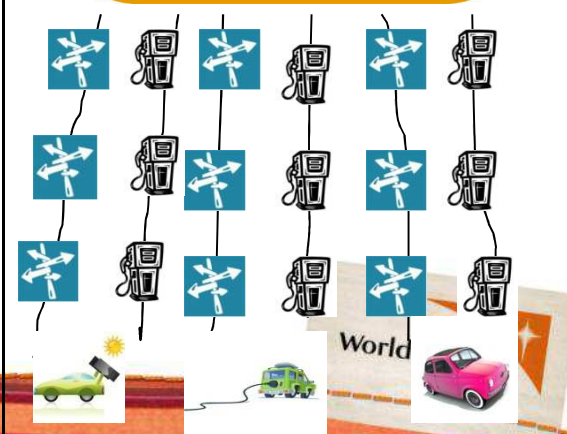
Step 3. Boundary Partners

Who do you work with?

Who?   Who?

Who?

Step 4. Progress Markers

Love to see

Like to see

Expect to see

Vision

Mission

Love to see

Like to see

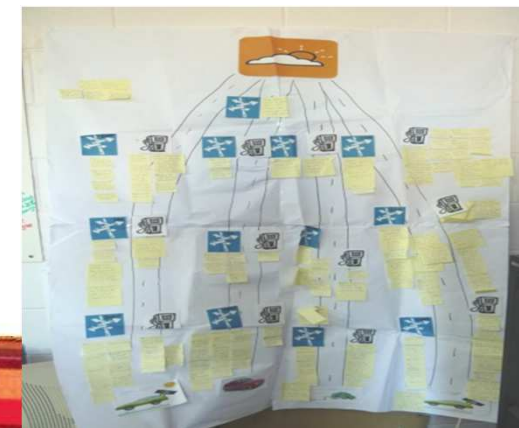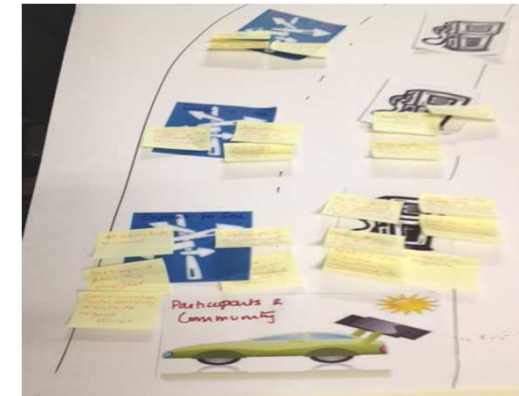Expect to see

Who   Who   Who

Step 5. Strategies

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Summary: How we modified the Outcome Mapping 'Intentional Design' process for the CDEP project

- We created a paper road map supported by visual tools:

  Boundary Partners were cars=
  Progress Markers were signposts along the road =
  Strategies were fuel pumps =

- Activity to brainstorm multiple ideas for the vision and mission (rather than creating single vision or mission statements)

- Used the levels of progress markers – 'expect to see', 'like to see' and 'love to see' as the structure for identifying desired outcomes (instead of creating a single 'outcome statement' for each stakeholder group)

- Identified strategies at each level of progress markers (instead of having only one level of strategies)

- Placed the organisation on the map together with boundary partners, and identified outcomes and strategies for the organisation (rather than creating a separate section for organisational practices)

How we used the activity with each provider

| Site 1	Site 2	Site 3	Site 4
4 CDEP provider staff	1 CDEP Manager, 2 CDEP mentors, 1 Employer, 1 CDEP participant	1 CDEP Manager	5 CDEP provider staff 5 staff of a partner implementing organisation
• Staff gained a better understanding of how each other viewed the project • Process created some debate amongst staff in order to reach consensus • Process highlighted a key strategy which is now focus of their PM&E	• Physical map allowed people to observe then join in when ready. Staff explained process to each other as other people joined the activity. • Process of people joining-leaving-joining the activity allowed people to speak more or less depending on who was present.	• Regional Manager plans to use outcome map at CDEP re-call meeting & may use it in community to plan CDEP activities. • The provider will change pictures slightly to better represent various groups (e.g. use pictures of project vehicles)	• Process allowed both organisations to share ideas for vision & mission (and reach some common understanding) • Complicated project set-up = many boundary partners (complicated process) • Value was the conversation that the map and activity facilitated, rather than the data itself

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What we found: Benefits, what worked well

- The images and language of the road map made the activity accessible. Participants quickly picked up on:

  - The language of 'expect to see', 'like to see' and 'love to see'

  - The images of the road, the concept of each group being on a journey, and the fuel pumps to represent strategies or inputs required along the way

- We sought to act as facilitators, rather than to verify or correct people's contributions. Participant's contributions were recorded in the way they were described; their language and terms were respected

- The activity supported a conversation amongst staff, where they shared their perspectives and generated fresh thinking and insights

- The activity asked for different information than the current CDEP reporting system – instead of discussing job outcomes, we were looking at the steps both towards and beyond getting a job, and all the factors involved

- The map and activity generated rich information about CDEP providers' existing knowledge about their communities and the opportunities and challenges for CDEP participants

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What we found: Challenges and limitations

- Managing the size of the map and the group – too many people or too few made it difficult to facilitate / have good input

- Need a good representation of relevant people at different levels – from management and community

- Allowing all contributions to the map, and relying on the group to interrogate the information, meant that sometimes outcomes or strategies identified may not have been realistic

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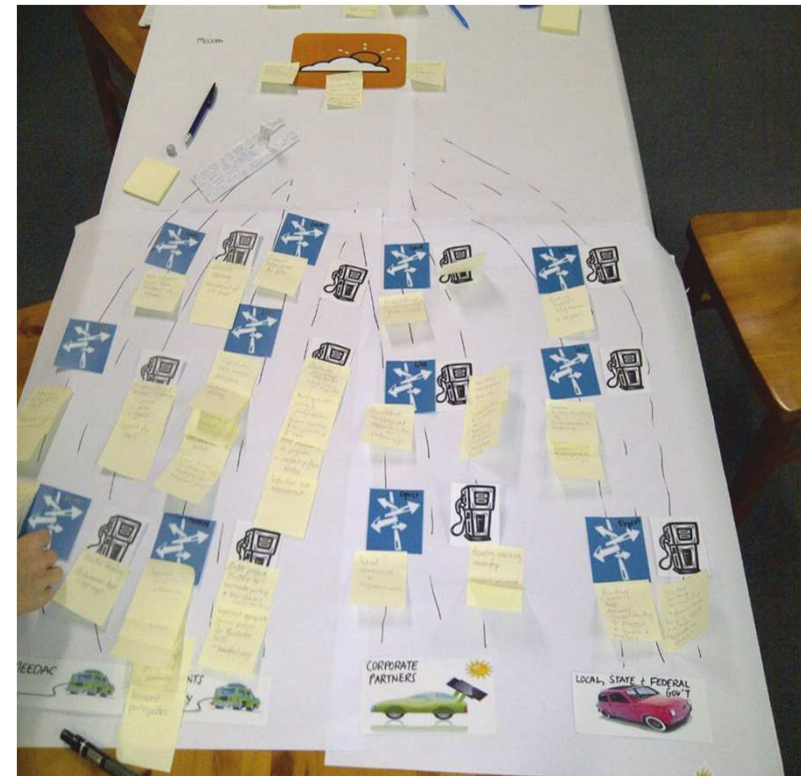
Outcome Mapping was not a stand-alone activity..

Stakeholder communication flow mapping
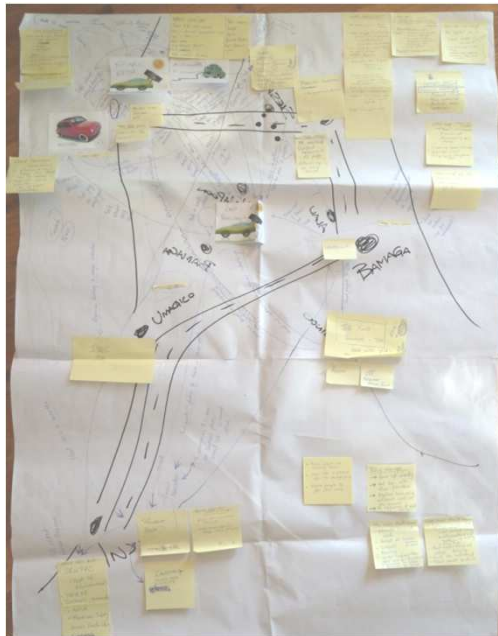
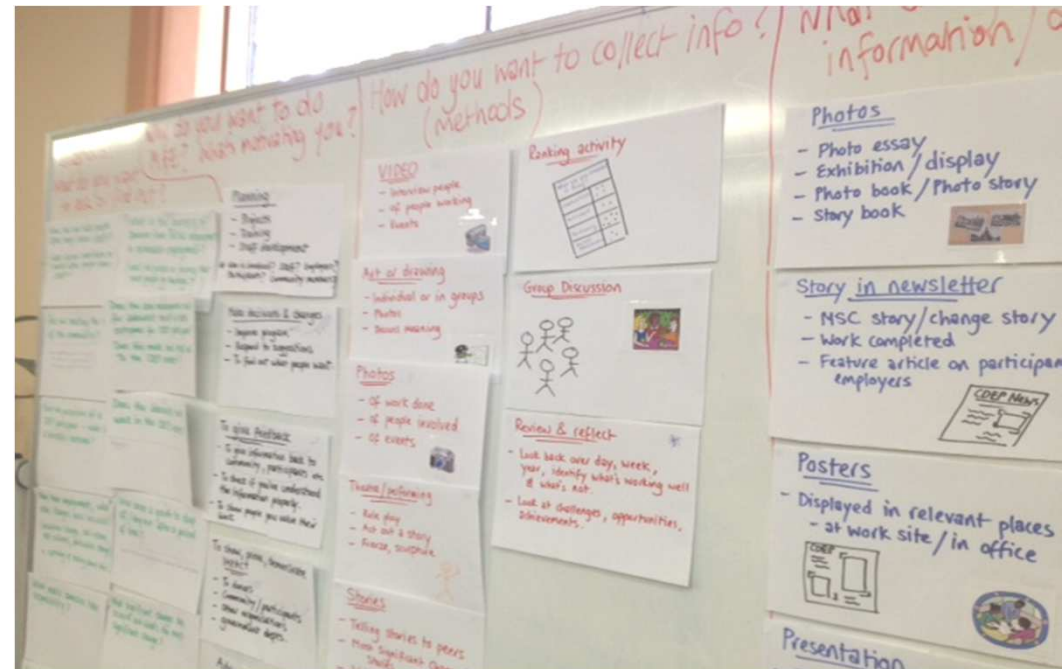**Reflecting back exercises (Identifying key evaluation questions, purpose, methods, use of information collected)**

Photo & video examples of PME

Feedback from providers

"*I think using the Outcome Mapping process is worthwhile, as it can help us identify what we hope to achieve in the short, intermediate and longer time frames. I will change some of the pictures, but I think I can use this for planning activities in the communities.*"
Manager, CDEP Provider

"*Listening to the project staff talk about their work as they went through this activity helped improve our understanding. We think this would be a really useful process to help us review and reflect on our other projects we manage.*"   CEO, CDEP provider organisation

The activity was useful for mutual learning for us and for CDEP providers – this was more important than the actual maps created (though we did also record these in more portable formats)

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Example 1

VISION					
MISSION					
CDEP Provider		Participants & community		Local, state and federal govt	
Progress Markers & Strategies		Progress Markers & Strategies		Progress Markers & Strategies	
Love to see	Strategies	Love to see	Strategies	Love to see	Strategies
Like to see	Strategies	Like to see	Strategies	Like to see	Strategies
Expect to see	Strategies	Expect to see	Strategies	Expect to see	Strategies

Example 2

CDEP Outcome Map	
Mission	
CDEP Participants	
Progress Markers	Strategies
Love to see	Strategies
Like to see	Strategies
Expect to see	Strategies
Employers/trainers	
Progress Markers	Strategies
Love to see	Strategies
Like to see	Strategies
Expect to see	Strategies

Example 3

CDEP Outcome Map	
Mission	
CDEP Participants	
Progress Markers	Strategies
Love to see	Strategies
Like to see	Strategies
Expect to see	Strategies
Employers/trainers	
Progress Markers	Strategies
Love to see	Strategies
Like to see	Strategies
Expect to see	Strategies

Recording the maps

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Implications for participatory evaluation practice

- Effective participatory evaluation approaches require skilled adaptation of tools and methods that are appropriate to context

- Reconsidering the language we use and how this can include or exclude people, can result in either extractive or participatory activities

- Establishing a common language supports working in partnership rather than "teacher – student" or "expert – beginner" relationships

- It is important to encourage participation from different people within an organisation. This can reveal divergent ideas and support improved group understanding.

- Visual tools and maps may seem simple – but they can be critical for making monitoring and evaluation accessible, for generating interest and involvement from people previously disengaged and for facilitating fresh conversations.

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