IDRC

INTERNATIONAL DEVELOPMENT RESEARCH CENTER

EVALUATION UNIT

OUTCOME MAPPING
GUATEMALA WORKSHOP EVALUATION REPORT

Consultant: Natalia Ortiz

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1. Background

The International Development Research Center (IDRC) has been working in the past few years, together with partner's organizations in different regions, in addressing the "problem with existing approaches to reporting on development impacts". The result of this process is a methodology, "called Outcome Mapping", that characterizes and assess the contributions made by development projects, programs, or organizations to the achievement of outcomes". "The originality of the methodology is its shift away from assessing the products of a program (e.g., policy relevance, poverty alleviation, reduced conflict) to focus on changes in behaviors, relationships, actions, and/or activities of the people and organizations with whom a development program works directly"[1].

Outcome Mapping (OM) was first published in English in 2001, while the first Spanish edition was published in 2002. The first introduction of the method in Latin America was during the method-testing phase in 1999, in the CODESAN Arracacha project that it has been developed in Bolivia, Ecuador and Peru.

Between January 28 and February 4 of 2003, IDRC organized an Outcome Mapping Workshop in Antigua Guatemala with the logistic support of CIRMA. The objectives of the workshop were:

Engage participants in a lively learning process on Outcome Mapping so that they have the knowledge and skills to use in ways that are appropriate to their specific contexts. The workshop was focused on 3 areas:
1) **Conceptual:** *Learning about the tools and methods of Outcome Mapping;*
2) **Group Facilitation:** *Learning and practicing group facilitation skills helpful in the practice of Outcome Mapping; and,*
3) **Practicum:** *Reflecting, planning, and practicing how to take Outcome Mapping forward in your specific context.*

After a period of 2 months where participants had the time to go back to their projects/institutions, IDRC decided to assess the training workshop outcomes. This report presents the results of the evaluation.

2. Purpose, results and steps of the evaluation:

The purpose of the evaluation is to provide IDRC Evaluation Unit with useful information to plan future activities to support the use of OM in Latin America.

The expected results of the evaluation are:
- ➢ To know how are participants using the OM concepts, the skills acquired during the workshop and the materials provided.
- ➢ After 2 months, identify where they are in relation to the gradient of agreement with the methodology. More supportive, less supportive?
- ➢ Identify if they are implementing the OM concepts in their projects/institutions. If yes how, if no, why not? What obstacles are they facing in using OM? What type of support would they find useful?

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[1] IDRC 2001."Outcome Mapping –The Challenges of Assessing Development Impacts". Front page.

The Guatemala workshop evaluation was planned to happen during April 2003 and, according to the terms or reference the next steps were done:

a. Plan an evaluation survey of the OM workshop in Guatemala, conduct the survey and collect the data
b. Send the Evaluation Unit the survey questions for feedback, and revise the survey with the EU suggestions (one of the questions suggested is to ask people to reassess where they stand on the 7th point scale that we used at the end of day 4).
c. Conduct the survey and collate the data through e-mail and phone calls.
d. During the interviews provide technical assistance on OM to participants on issues raised throughout the survey.
e. Present a report to the EU (in English) on the survey results, questions asked by participants and technical assistance provided.

3. Methodology:

The main tool used for the evaluation was an email survey that was designed by the consultant and complemented by the IDRC Evaluation Unit (See Annex 1). The survey was sent to 26 participants of the Guatemala workshop by e-mail, and 18th of them completed it; seventeen in a written and, one was completed by phone interview.

Once the consultant received the surveys completed, the information was processed and analyzed; using the survey questions as guiding principals for the analysis. Unclear or incomplete information was precised through phone interviews or by sending few additional questions through email. The additional questions asked were divided in two groups:
a. One group to capture details, such as: name of projects were OM was applied or is going to be applied; name of organizations involved; dates of application or dates planned for an OM application.
b. The second group of questions was composed by open questions focused to capture information on new opportunities that the respondents visualize to apply OM, and recommendations to IDRC to expand the use of OM in Latin America.

For a complete list of respondents, phone interviews and people that add information through e-mail see Annex 2.

4. Limitations of the Evaluation:

Only 69% of the Workshop participants were disposed to answer the survey either by e-mail or by phone (18th of 26). After completing the survey, not all the respondents were willing to add information. Therefore, not in all the cases the unclear information was possible to clarified. However, except for Pro-Rural in Bolivia and the representative of AVINA Foundation, at least one member of the organizations that participated in the workshop answered the survey. Even though the information and conclusions presented in this report, it doesn't represent 100% of the individuals and organizations that participate in the workshop, it represents a considerable number of them.

The holiday in April was definitely a cause of delay to the respondents to complete the survey. Most of the surveys were received after the holly week; fact that limited the possibility to deepen some of the information received, and delayed the report.

5. Results of the surveys, phone interviews and e-mail additional information

The results were organized around the questions asked on the survey. The reported information corresponds to the most highlighting answers because of frequency, and-or because of being positive or negative comments. In the cases were it is considered pertinent, the number of participants that expressed similar ideas is identified. While in the cases were it was considered pertinent to consider all the non-neutral comments of the respondents, they are included between quotes. When relevant, syntheses comments are included.

5.1. Have you been advocating for the adoption of Outcome Mapping principles and tools in your work? Why? Why not? How have they been received?

Number of participants that answer YES	Number of participants that answer NO
16	2
Synthesis of Highlighting comments	**Synthesis of Highlighting Comments**
Comments on OM principles and philosophy: ➢ " OM is a new way to see and understand development" ➢ "OM enables a more reliable approach to reality, seen it as a multidimensional and complex system" ➢ "It enables, not only, to improve the ways to do development and research, but enables a more integral, holistic, systemic and ecological view of reality" ➢ "The principles of OM, more than its steps, have been well received." ➢ "Stop talking about artificial impact, makes OM an attractive and realistic method" ***Comments on behavior changes:*** ➢ "The emphasis on the individuals and organizational changes is very useful." ➢ "We share the assumption that the human changes should be processed as changes in behavior" ➢ "Human beings enforce changes in Environment and societal institutions. Therefore focus on changes in human behavior is a good mean to identify how humans are influencing their environment." ➢ "The monitoring of changes in behavior can not replace the monitoring of results" ***Comments that expressed OM as complementary to other methodologies:*** ➢ OM is not seen, by five of the participants, as a new approach but as complementary to other planning and evaluation methods. ➢ "OM is a type of planning and evaluation method that integrate qualitative elements that are not capture in a quantitative type of evaluation. OM can complement and improve evaluation processes" ***Comments that expressed OM as more appropriate method for research, training and enhanced capacity programs and projects:*** ➢ OM is perceived by 2 of the respondents as highly adequate to plan and assess training and educational programs, as well as institutional strengthen programs. ➢ 3 respondents feel that OM is more appropriate to plan and assess research programs than development ones. ***Operational comments of OM:*** ➢ "OM is a set of criteria and tools, easy to adapt to diverse situations." ➢ "OM it's a good instrument for participative planning, organizing and monitoring of program activities" ➢ "OM is an approach that may be easily adapted to participative processes, and is less rigid than other approaches as Log frame Analysis". ➢ "OM its better received by social professionals than from professionals from other disciplines" ➢ It is perceived by 4 of the respondents that applying OM will require a big investment of time	➢ Most of the respondents linked with COSUDE programs and projects coincide on the opinion, that they have their own planning, monitoring and evaluation methods that works well. Therefore OM becomes an interesting method to complement the ones they're using and not to replace them. ➢ "I don't feel well to promote the use of OM before using it"

5.2. How does respondents have used or plan to use OM?

Most of the respondents have applied one or more steps of the intentional design in their work context. Some of them made presentations that were well received by different audiences, that in most cases manifested interest in deepen their knowledge on OM theory and practice. Some of the respondents plan to apply or continue applying OM during 2003. The matrices below provide details on these aspects.

Respondents that have applied OM steps after the Guatemala workshop:

Ten (10) respondents of 18[th,], manifest that they have used OM as a result of the Guatemala Workshop. The next matrix show us where has been used? When? Who use it? In which context?

Where?	When?	Who?	In which context?
Bolivia, Perú y Ecuador	Started in December 1999 – until now	At a regional level CIP-CODESAN In Ecuador Ministry of Agriculture and livestock. In Perú, ESCAES In Bolivia Institute of Social and Economic Studies of San Simón University	- Planning and monitoring of the Arracacha Agro industry and Markets project, in San José de Minas Ecuador, Sucse Peru and San Juan de la Miel Bolivia.
Bolivia	After the Guatemala Workshop	INTERCOOPEARTION Bolivia	- Application of step 3, in the planning process of a development project.
Perú	After the Guatemala Workshop	Raúl Delgado facilitator IESE/UMSS Bolivia	- Partial application of the intentional design (steps 1 to 6), in rebuilding the processes of a natural resource management project (MARENAS) in Sierra Sur. MARENAS is a project of the Peruvian Ministry of Agriculture, financed principally by FIDA.
Quito, Ecuador	After the Guatemala Workshop	COSUDE-IC	- Partial application of the intentional design (steps 1 to 4 completed, steps 5 to 7 in process), in a development project.
Carchi, Ecuador	April 2003	Corporación Grupo Randi Randi - IDRC	- Complete Intentional design application (Steps 1 to 7)
Colombia	March 2003	RAIZ Association (ASRAIZ)	- Partial application of the intentional design (steps 1 to 6), in the ASRAIZ strategic planning process.
Costa Rica	After the Guatemala Workshop (February and March)	Facilitated by Claudia Bouroncle, organized by CATIE	- Partial application of the intentional design (steps 1 to 4), in the design of the project: "Improvement of the Central American Natural Resource High Educational Programs".
Guatemala	During and After the Guatemala Workshop	CIRMA	- Partial application of the intentional design (steps 1 to 4), for planning improvement of the project: "Improvement of the Guatemala interethnic relations".
Honduras	After the Guatemala Workshop	IDRC-Honduras	- Partial application of the intentional design (steps 3 to 5) to build the IDRC Honduras work plan.

Where?	When?	Who?	In which context?
Bern, Switzerland	After the Guatemala Workshop	Central COSUDE in Berna	- Intentional design has been promoted and some of its steps used in the conceptualization and planning of the COSUDE programs and projects.
United States	After the Guatemala Workshop	Coastal Resource Center USA	- Partial application of the intentional design (steps 1 to 4), in the Coastal Resource Center Strategic planning. - Step 5 was used in developing action plans for a new initiative.

Respondents that made OM presentations or workshops:

4 of 18th respondents have made presentations of OM as it is shown in the next matrix:

Where?	When?	Who?	In which context?
Bolivia	After the Guatemala Workshop	Raúl Delgado facilitator. Course organized by the Private University of Bolivia, with the support of the CAF and an American University.	- Presentation of OM to representatives of Rural and Urban municipalities of the Cochabamaba region, in the context of a "Municipal Governance and Public Management Course".
Quito, Ecuador and La Paz, Bolivia	After the Guatemala Workshop	COSUDE-IC	- Presentation of OM and some of its applications, to the COSUDE projects staff in Quito and La Paz
Bern, Switzerland	After the Guatemala Workshop	Central COSUDE in Bern	- Presentations of OM to COSUDE Latin American program officials (7 professionals) - Presentations of OM to the COSUDE Controlling & Evaluation net (8 professionals). - Presentation of OM to CARITAS-Switzerland and Fastenopfer-Switzerland - OM books where distributed during the above presentations.
Panama	March 24 2003	Natalia Ortiz as facilitator	- Presentations of OM to the NATURA Foundation project officials and Institutional strengthen program coordinator. - Copies of the OM book has been distributed to NATURA Foundation and to ASRAIZ associates in Panama, Guatemala and Colombia.
Colombia and Costa Rica	May-June 2003	ASRAIZ (Natalia Ortiz and Claudia Bouroncle)	- Adoption and adaptation of some of the OM tools to improve a planning, monitoring and evaluation methodology based in log frame analysis

Where?	When?	Who?	In which context?
Honduras	April 28, 29 y 30 of 2003	Coordinated by ANAFAE and CIID-Honduras	- Implement an Outcome Mapping national training workshop, focus to private and public organizations working in diverse development areas, and some of its networks (UNAT, REDHEC, ANAFAE, etc.). Other partners like universities and cooperation agencies (i.e. GTZ) will also participate.

Respondents expect to use OM during 2003 and 2004 in the following concrete cases:

10 respondents of 18th, plan to use OM during 2003 and 2004.

Where?	When?	Who?	In which context?
Costa Rica	Start on late May 2003	ACCESO	- The ACCESO Planning, Monitoring and Evaluation Program (P.M&E) is phasing a redesigning stage. They plan to incorporate some of the OM applications to complement their P,M&E processes.
Costa Rica	To be defined	Facilitated by Claudia Bouroncle, organized by CATIE	- Finish the intentional design (steps 5 on), in the planning process of the "Improvement of the Central American Natural Resource High Educational Programs" project.
Guatemala	Start on April 1st 2003 and end on February 4th 2004.	CIRMA	- CIRMA has decided to implement a pilot application of OM in a small program: the "Youth leadership". After the pilot they expect to define further applications in other areas of the organization.
Ecuador Northern Region	End of April, 2003	Corporación Grupo Randi Randi	- Facilitate an OM workshop in a specific project
Galapagos, Ecuador	Between June and August 2003	ECOCOSTAS	- Project design for the Galapagos region.
Bolivia	To be defined	INTERCOOPERATION – Pro Rural	- Analysis of the OM elements and steps that could be adapted to complement the Intercooperation P,M&E present methods and tools.

Where?	When?	Who?	In which context?
8 Projects of coastal management in Latin America:	To be defined according to funds availability	- Mexico: 2 projects, 1 sponsored by USAID and the other by CI - Ecuador 2 projects, sponsored by the IDB - Central America 1 project sponsored by USAID - Belize, 1 project sponsored by the local government - Uruguay, 1 project financed by Canadian Government. - Brazil and Chile, 2 projects to be confirmed.	- An agreement between the leaders of 8 coastal management projects in Latin America, has been done to use OM as a common method to collect learning's from their respective contexts. This initiative is subject to funding availability. - Link to the above initiative there's the need to run a workshop with the network members. To run this event, they'll need someone who has a good experience and knowledge on OM methodology.
Panama	Last trimester 2003	Natalia Ortiz as facilitator	- Some steps of OM will be use in the design of the monitoring system for the projects financed by the Panama Environmental Fund. - OM will be use in the planning, monitoring and evaluation of the NATURA Foundation Institutional Strengthen Program. The latter is subject to funding availability.
Uruguay	May 2003 2004	Clara Piriz as facilitator. Clara Piriz as facilitator.	- Adaptation of the intentional design, to address a six-month project for Improvement fishing technologies, sponsored by UNESCO. The project will involve fishermen, local institutions and inhabitants of the coastal tourist area. The challenge will be how to involve the fishermen in developing the intentional design. - Application of an adaptation of OM to the needs of the ECOPLATA project. This will take place if the financial and institutional problems that the ECOPLATA project is phasing are solved.
Nicaragua	June 2003	PASOLAC - INTERCOOPERATION	- Design the Intentional design to plan PASOLAC second phase. Subject to support and interest from COSUDE.

5.3. Have you had the opportunity to use Outcome Mapping or some of its steps? Complete the matrix accordingly.

At least half of the respondents that answer the survey applied one or more OM steps of the intentional design after the Guatemala workshop. None of them applied any step of the monitoring and evaluation stages, as in most cases, it is too premature to do so. Most of the benefits obtained are closely linked with the purpose defined in OM for each step. Most of the difficulties expressed are related with: a week understanding of the principles and theoretical framework that underlay OM; a difficulty to conciliate the concepts the participants are use to, with the ones proposed by OM; the lack of practice that makes the application of some steps more complex; and few difficulties related to methodological weaknesses identified, mostly linked to operative tools (i.e. guiding questions, overlaps between steps or unclear delimitation between some of them).The next matrix shows the details of the respondents answers.

Outcome Mapping Steps	# of participants that have applied the step	Benefits obtained	Difficulties	How you overcome or you feel can you overcome the difficulties faced?
1. Vision	7	- Enables higher precision in the planning process - Useful step and easy to apply - Enable a more flexible planning process - Ability to look beyond the immediate timeframe - Enable to clarify the expected *impacts* at the end of the project	a. Guiding questions were not clear b. Week understanding of the theoretical framework c. Long and not succinct	a. Improving the guiding questions b. Applying the step c. Compromise on length to 2 or 3 paragraphs
2. Mission	7	- Useful step. It helps to specify better the roles and responsibilities, when there are different organizations involved in the program or project. - Enable a more flexible planning process. - Ability to look beyond the immediate timeframe. - Help to reflect the complexity of the processes promoted by the project. - Help to identify the project contribution to the vision. - Enable to make explicit a common mission between different organizations and partners within a project.	a. Week understanding of the theoretical framework b. Long and not succinct c. There's confusion between the concepts of mission and strategies and its limits. **(*)**	a. Applying the step b. Make it shorter c. The group of users discussed and defined in a participatory way the limits between both concepts

Outcome Mapping Steps	# of participants that have applied the step	Benefits obtained	Difficulties	How you overcome or you feel can you overcome the difficulties faced?
3. Identify the boundary partners	7	- Enable a more flexible and clear planning process - Helps to realize that there are many different stakeholders to influence - Helps to clarify who are and who are not boundary partners. - Helps to clarify the role of each of the groups involved directly or indirectly in the project, and to foresee actions to facilitate their participation.	a. Week understanding of the theoretical framework b. Difficulty in limiting the partners c. Difficulty in differentiating boundary from strategic partners d. Confusion in differentiating the program boundary partners from their boundary partners (*)	a. Applying the step b. Refining the definition of boundary partners c. Focus not only on boundary partners but also in a broader analysis of stakeholders that might be involved in the project. d. Even though, the confusion persists, the discussion has pressed the team to think on which stakeholders the program wish to observe changes of attitude.
4. Identify the outcome challenges	8	- Innovative and motivating step that enable a more flexible planning process. - Helps to understand that changes in reality are the result of the contribution (not attribution) of multiple actors. - Enable a vision of alliances of multiple stakeholders and multiple benefits, around common and broader interests - The dynamic of defining outcome challenges is simpler than the traditional one of defining objectives.	a. Week understanding of the theoretical framework b. Too complex c. Difficulty to change people's habit to assume the "changes" in the human behavior and not in the context. d. Confusion around the appropriate way of phrasing the outcome challenges (*) e. Participants phase the difficulty of define concrete outcome challenges	a. Applying the step b. Limiting the exercise to two boundary partners c. Promoting the understanding of different levels of boundary partners, its roles and responsibilities as conditioning for any change on the context to happen. d. Not clear yet "the correct" way of phrasing the outcome challenges. e. Practice and getting use to the new approach.

Outcome Mapping Steps	# of participants that have applied the step	Benefits obtained	Difficulties	How you overcome or you feel can you overcome the difficulties faced?
5. Develop graduated progress markers	6	- Enable a more flexible planning process - Help to visualize short term/long term reality of the work - Facilitate the monitoring process enabling opportune adjustments.	a. Week understanding of the theoretical framework b. The language used by OM to categorize the progress markers was too difficult c. Difficulty to develop the graduated progress markers without considering a time reference d. Tendency to limit the project commitments in relation to the progress of outcomes	a. Applying the step b. Using a different analogy and more common terms c. Incorporating in the progress markers a time frame (short, medium and long term). d. Sensitize the OM users on the importance to assume the commitments as challenges and not as something compulsory, punished in the case they are not fulfilled.
6. Complete a strategy map for each outcome	4	- Enable a more flexible planning process - Some respondents' agreed that the subdivision of the strategies in casual, persuasive and supportive is a very useful tool to motivate people to think in other strategies different from the casual ones. However one of the participants expressed that the step is complex, confusing, and does not help too much. - Help to see the strategies not as an activity, but as a multidimensional dimension that involves actions, the way and means of doing things, and the stakeholders.	a. Week understanding of the theoretical framework	a. Applying the step

Outcome Mapping Steps	# of participants that have applied the step	Benefits obtained	Difficulties	How you overcome or you feel can you overcome the difficulties faced?
7. Articulate organizational practices	3	- Enable a more flexible planning process - Enable to clarify the changes needed in the organizational practices to achieve the proposed changes in behavior.	a. Week understanding of the theoretical framework	a. Applying the step

(*) **Note:** Feedback was given through e-mail, to the respondents that raise the difficulties highlighted on red color.

5.4 .Do you think you have the needed skills to facilitate the use of Outcome Mapping? If not, what skills you think you're lacking?

Most of the respondents feel that they have general facilitation skills that could help in the OM facilitation process. However, to fully facilitate an OM application, most of them feel the need to apply the method first, and/or observe an OM facilitation process by someone experienced with the methodology, and/or the need of deepen his or her understanding of the methodology.

Number of participants that answer YES	Number of participants that answer NO
15	3
Highlighting Comments	**Highlighting Comments**
➢ According to the respondents the theory and conceptual elements are clear for most of them. However practice is needed to validate the acquired knowledge and the method itself (8 similar comments repeated). ➢ Observe an OM facilitation process by someone experienced in the method, could help to obtain major elements to address the facilitation process (3 similar comments repeated). ➢ 4 respondents manifest to have skills to facilitate OM at a basic level. ➢ 3 respondents manifested that they have facilitation skills in different topics, that could be apply to OM. ➢ One respondent expressed that needs to improve the knowledge on OM to ensure a good facilitation process. ➢ 2 respondents didn't make any comments.	➢ One respondent expressed the need to read in depth the material and explore the case studies to understand the uses of OM according to the different contexts. ➢ One respondent expressed the need to practice before affirms that counts with enough skills to facilitate OM. ➢ One respondent expressed that theory and concepts of OM are clear. However there's the need to apply the method first and/or observe a OM facilitation process to obtain the real skills to facilitate the process without pervert the method. This comment is similar to the first and second comment in the nearby column.

5.5. After 2 months of being trained in Outcome Mapping…

Note: The number in brackets "(#)", represents the number of similar comments.

What should be maintained in the Outcome Mapping training processes?	What should be added?	What should be changed or adapted?
Content	**Content**	**Content**
➢ The explanation of conceptual principles. ➢ Theoretical explanations combined with, examples, workgroup exercises (3). ➢ Practice with concrete/personal cases (5) ➢ The use of applied examples (1)	➢ Emphasize more on the OM philosophy, principles and subjacent hypothesis: Why focus on behavior changes? Why the need to understand reality from a more complex an integral perspective? (4) ➢ A comparison of OM with other methods, to provide a better explanation of its theoretical framework, and of, in which circumstances OM contribute most (2) ➢ A better analysis on 'outcome challenges' and 'progress markers' to establish, up to what level this measures can replace the results indicators (2) ➢ Include guidance in how to facilitate conflict resolution and negotiation process between different stakeholders that may be part of a program (1) ➢ More practical exercises (1)	➢ Eliminate the training on "facilitation skills" (6). ➢ Cha nge prototype exercises for personal ones (1). ➢ Open a space to give methodological feedback and suggestions (1). ➢ Emphasize more on the monitoring and evaluation stages training. Include tools to collect and process data (5) ➢ Include examples more adequate to the rationality and reality of the place where the workshop is taking place and to the type of participants (2)
Process	**Process**	**Process**
➢ Support materials and visual aids (3) ➢ The participants international and multidisciplinary character (1) ➢ The logistics and good organization of the workshop (1)	➢ Time for participants to co-facilitate OM steps with their groups, supported by the trainers (2) ➢ More group discussion (1) ➢ Organize a second training phase, based on participants OM applications experiences (1) ➢ Train on monitoring mechanisms and tools (1)	➢ Personal cases can be brought in the beginning and then can be worked on throughout the training. Use a learning by doing approach (5) ➢ Decrease the length of the workshop to five days or less (3). ➢ Limit the time for discussions (1). ➢ Give more feedback to the results of the workgroups (1). ➢ Change workgroups members to enrich discussion and enhance participants understanding (2). ➢ Give the course in the local language (2).

5.6. Gradient of agreement. From your present view of Outcome Mapping, select the option you identify yourself with:

Gradient of agreement	# of participants
1. Endorsement. "I like it"	**5**
2. Endorsement with a minor point of contention. "Basically I like it".	**10**
3. Agreement with reservations. "I can live with it".	**3**
4. Agreement with reservations. "I can live with it".	
5. Skeptical, with reservations. "I'm skeptical and I've got reservations."	
6. Major reservations. "I don't see how I would use it in practice".	
7. Block. "I would advise against using it. Don't agree with it.".	

5.7. If you're interested in promoting, or continuing promoting, the use of the Outcome Mapping principles and tools in your work context, which support from IDRC may you need?

The following matrix organized the comments of the respondents by type of support required from IDRC to promote or continue promoting the use of OM. In some cases, the respondent's comments were reallocated to a more appropriate "type of support" than the one selected by the respondent, if it was considered necessary.

Note: The number in brackets "(#)" represents the number of similar comments.

Type of support required	# of participants that ask for the support	Highlighting Comments around the support needed from IDRC
Materials	8	- Books and training kits, both electronic and/or printed (4) - Possibility to reproduce and adapt the OM book (2) - Make available documents of OM applications and experiences in the region, through the WEB or by other mean (3). - More information of the OM origin and evolution (1) - Design Monitoring and Evaluation tools adapted to OM (1)
Online discussion group	7	Seven respondents agreed on the importance of organizing a practitioners group to enable: - Exchange experiences - Follow up the ongoing applications - Improve the method - Exchange useful adaptations - Clarify doubts ASRAIZ manifested their interest in develop a join effort with IDRC to promote the online discussion group. For that offer to IDRC the possibility to use a *Sustainability M&E network–REDES (*www.redmye.net)
Support to train colleges and others	4	- Four respondents expressed the need of technical and financial support to develop training events.
Support to facilitate the use of Outcome Mapping	9	- Co-facilitation support while experience is gain (3) - Observe a OM facilitation process by someone experienced in the method (1) - Support from someone that knows well the OM assumptions, which can contribute with examples, facilitate discussions on advantages and disadvantages of using OM, and guide different ways of applying it (1) - Support to follow up and attend the promoted OM applications (2) - Financial support to finance or co-finance workshops to expand de use of the method (3) - More training on OM specific topics (1) - ASRAIZ, ACCESO and Juan Manuel from CIRMA manifested their interest in develop a join effort with IDRC to expand the use of OM in Central and South America.
Other supports (Specify which ones)	8	- Institutional will from COSUDE to apply the method in the project they sponsor (2) - Funds to continue the research and development of OM methodology, based on concrete research and development projects (1) - Support on how to combine OM with other methods (2)

6. Conclusions and Suggestions

6.1. Related to the respondent's perceptions on OM principles and tools.

➢ The OM principles have been better received than the method itself. The idea of focusing on behavior changes instead of focusing on products and searching for 'impact', is found innovative and is seen by respondents as a change of paradigm, that will enable to approach research and development initiatives in a more holistic and systemic way.

➢ There are different perceptions of the possibility to adopt OM, according to the type of respondent:

   a) For those interested in the P,M&E methodological development, OM appears as a new method to experiment, that contains elements that can be used as a whole, or that can be used separately to complement other P,M&E methods. In this category are the respondents of ASRAIZ, ACCESO, CATIE and COSUDE Switzerland. This group of respondents is perceived quite open and receptive with OM approach.

   b) For those respondents that are part of IDRC programs and projects, OM appears as an appropriate P,M&E method endorsed by the Evaluation Unit. Despite there is a so call 'institutional back up' to the method; there are still some doubts about the convenience or not of focusing only on behavior changes, and not in 'tangible, verifiable, objective results'. The latter understood as changes on the environment or societal institutions. This group of respondents is receptive with OM, and, is willing to use the method and let the practice tell them its utility.

   c) Finally, respondents that are not directly linked with IDRC projects may be divided in two groups: Those who already have established P,M&E methods for the projects they deal with; and those who are searching for innovative P,M&E methods to apply in their program and projects. Mainly respondents linked to COSUDE – Intercooperation projects and programs in South America, represent the first group. Therefore, for them, OM represents a complementary method to enrich the ones they are using. Respondents linked to COSUDE – Intercooperation projects in Central America, and other organizations such as AVINA Foundation, ECOCOSTAS Foundation, USA Coastal Resources Center, etc. represent the second group. The latter are more receptive with OM approach as a whole, and most of them are willing to find opportunities to apply it.

➢ Various respondents see OM as a more adequate method to P,M&E research, training and enhance capacities programs or projects, and/or for small developmental projects. As most of the respondents have not been involved in OM application experiences, there's a generalize feeling that applying OM in cases that involved various boundary partners may become quite complex and, may need a huge investment of time and resources. Only practice will let practitioners to balance the complexities and cost-benefit relation of using OM.

6.2. In relation to plans for using OM, and of experiences of applying OM steps

➢ Ten respondents of 18th,, manifest that have used OM as a result of the Guatemala Workshop; Four of 18th respondents have made presentations of OM to their colleges or partners organizations; and ten respondents of 18th , plan to use OM during 2003 and 2004.

➢ Most of the OM applications were linked to one or more steps of the intentional design, as two moths is not enough time to introduce a new method and apply all its steps.

➢ Most of the expected OM applications during the rest of 2003 and 2004 will depend on financial availability (for details see numeral 5.2.). This is not surprising as many programs and projects does

not consider budgets for P, M&E, and/or they already have budgeted the time and funds needed, based on the methods they are used to, and not based on the OM needs.

➢ Most of the difficulties faced by the respondents during the implementation of some of the OM steps are originated on:
   a) A weak understanding of the subjacent principles and hypothesis of OM;
   b) Lack of familiarity with P,M&E methodologies, making more difficult for less experienced practitioners to visualize how to apply OM steps; as they are based on guiding questions more than on operational recipes; and,
   c) The tendency of trying to link or relate OM concepts and steps with the concepts and steps of methods that practitioners are familiar with, such as ZOPP and Log frame analysis.

➢ When introducing OM, further clarifications and discussions on OM principles and subjacent hypothesis may be needed, as well as making available comparisons of OM with other commonly used P,M&E methods, to enable practitioners to easily identify conflictive and complementary elements between different methodologies. These two activities may decrease resistance to adopt OM, or some of its steps and principles.

➢ Other types of difficulties faced by OM practitioners were related to a weak understanding of some of the concepts used by OM, generating a difficulty to differentiate some of them. The most common confusions were present in clearly identify the difference between *mission* and *strategies*, as well as in identifying the different types of boundary partners. E-mail feedback was given to the respondents that raised the difficulties highlighted in red color in numeral 5.3..

6.3. In relation to methodological aspects

➢ It's perceived that the monitoring and evaluation stages need to be more developed. Some of the comments addressed the lack of tools to collect, processed and use the information gathered in the monitoring stage (i.e. use or diaries). The absence of an appropriate evaluation stage adapted to OM was also addressed. However, it's important to considered that only one respondent have applied the monitoring stage (Arracacha project experience). He expressed that OM is a very flexible tool that have enabled them to successfully adopt and adapted the outcome challenges and strategies diaries in their monitoring processes. These tools have helped them to: a) gather analytic information in a systematic way; b) write final reports; c) make better decisions; and, planning adaptations. The OM monitoring stage is seen by the Arracacha project team, as complementary to the research process promoted by the project.
To motivate OM practice, document-monitoring experiences and to promote experiences exchange between practitioners of the monitoring stage, may be useful to identify if there're really elements missing on this stage. In relation to the evaluation stage, is suggested to develop complementary tools that represent well the OM principles. Mainly, those related with the hypothesis that are implicit in deciding which behavior changes the program/project want to address and why.

➢ One respondent stressed that the 'sustainability[2]' issue is not well reflected in OM. This kind of thoughts demonstrates, from my point of view, a weak understanding of the principles and hypothesis underpinning the OM methodology. If one accepts behavior changes as the base, or as the guiding principle for any other change in reality (apart from those induced by nature), focusing on behavior changes should be a way of guarantee continuity in the processes aimed by the initiative. Is suggested to open a discussion on the topic to collect other perceptions and to gain a common understanding in practitioners on this point.

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[2] *Sustainability* understood as the continuity of processes once the financial support of a project is retired and or the project finished.

➢ For some respondents from COSUDE, OM reflects pre-establish roles for the funding organizations, the implementer organizations and the beneficiaries groups. Therefore, contradicting the purpose of some donors of giving to the beneficiaries a more protagonist role in the planning, monitoring and evaluation processes. This perception, may represents a misunderstanding on the concept of boundary partners, and/or the difficulty of some participants to transcend the examples used in the book and workshop, where, in most cases, IDRC appears as the organization that is defining the boundary partners for its projects. A suggestion is to diminish this type of perceptions, is to rotate the members of the workgroups during the training workshops in order to motivate the exchange of perceptions and avoid that some participants go back to work with preconceived and bias ideas.

➢ OM is a flexible methodology in continuous construction. IDRC has established some channels to receive and share inputs from practitioners such as sharing documents through the Evaluation Unit Website (http://www.idrc.ca/evaluation), two-way dialogues with a number of organizations that are using OM worldwide, and presenting at conferences to share experiences. Once there is a consolidated group of practitioners in Latin America, it is suggested to define with them the best channel(s) to capture possible methodological inputs and lessons that may arise from their use of OM.

6.4. Related to OM training processes

➢ Is highly recommended to reduce the workshop duration. Options to do so could be eliminating the facilitation skills introduction (first day), limiting the time for plenary discussions and, use along the workshop the personal cases instead of prototype exercises (see next point).

➢ Combining theoretical explanations, with examples and workgroup exercises has been received very well by respondents. However, is suggested to incorporate a learning by doing approach, by bringing personal cases in the beginning of the workshop and work on them throughout the training.

➢ More emphasis is needed on the OM theoretical framework as most of the difficulties that respondents have faced in applying OM steps, were based on a weak understanding of the OM underpinning hypothesis and principles.

➢ A recurrent reflection made by some respondents was the need to clearly define whom to involve in the design of each of the OM steps when the method is going to be applied in a participatory way. Is suggested that IDRC collects a set of experiences on this topic, to make them available to new practitioners to enlighten their decision making process about which boundary or strategic partners to involve and when.

➢ Is suggested to promote a second round training to deepen on the theory and practice of the monitoring and evaluation stages. To do so, is needed to further develop the evaluation stage, and/or, design a training workshop based on exchanging OM M&E experiences, as a participatory way of building OM M&E knowledge and abilities in participants.

6.5. Related to expand the use of OM in Latin America

There are two strategic options to expand the OM use in Latin America: a) To provide technical assistance in the OM design stages, and further assistance in following up the evolution of ongoing OM experiences; and, b) to provide the possibility of exchanging experiences between OM practitioners to enhance practice and facilitate the adaptation of OM to specific contexts.

To address the first strategy, two options are suggested:

- ➢ To consolidate the capacities of a group of organizations to use OM, to facilitate the use of OM, and to run OM training workshops. There's an interest manifested by ACCESO, CIRMA and ASRAIZ to become OM promoters and facilitators that could be use by IDRC.
- ➢ To create a small OM technical assistance group, to fulfill the practitioners technical needs and to systematize and distribute lessons learned from OM practical experiences around the region.

To address the second strategy, two options are recommended:

- ➢ To create an online discussion group of practitioners as an open space to: exchange experiences, to follow up the ongoing applications, to share methodological improvements and, to clarify doubts.
- ➢ To motivate the exchange of experiences, by inviting OM practitioners of one program/project to work together with teams of similar programs/projects that are also applying OM.

Other punctual supports required from IDRC, that were mention by respondents are:

- ➢ Financial support to introduce the practice of OM.
- ➢ Printed and-or electronic material to facilitate the OM.
- ➢ Access to documents of OM experiences in the region.

It's important to highlight the effort that IDRC is doing in giving continuity to the process that started with the Guatemala workshop. Based on the results of this evaluation together with IDRC priorities, is highly recommended to design an *intentional design* and *monitoring stage* to plan and assess the OM promotion process in the region.