

how to organize an outcome mapping training workshop

While every Outcome Mapping workshop is different, with different participant needs and dynamics, this document is intended to serve as a base from which to plan your workshop to ensure that you cover the basics. Your own creativity, organization and facilitation skills will make your workshop a true success. This “how to” binder aims at providing you with the necessary, timely reminders, so that you don’t have to think of everything. If you’re organizing a workshop, you’ve got a big job in front of you and you don’t want to skip any of the essential tasks or important details.

who is this binder for: facilitators and managers of projects and programs that have contracted a facilitator and / or team of logistical support people.

what you will find in this binder: you will find checklists, resources, sample materials, and timelines. Here is a basic layout of the binder:

section one: timelines and checklists

- Timelines for key communications
- Checklists for materials, venues and accommodations
- Roles and responsibilities

section two: getting started

- Determining training needs
- Promotion of workshop
- Selecting participants
- Invitation for nominations

section three: communicating with your participants and others

- Logistics information
- Participant questionnaire
- Participant survey / expectations
- Pre-workshop homework
- Confirmation letters
- Thank you letters

section four: for the facilitator

- Facilitator sheets; notes for special sessions

- Facilitator agenda

section five: evaluating the workshop

- Different types of evaluation for assessing the workshop during and after.



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evaluation unit – IDRC
september 2007

checklist: communications

when	nature / content of communication	sent to	sent by
4 months prior to w/s	Call for nominations for potential participants	IDRC Echonet	facilitator
3.5 months prior	Close call for nominations and begin review and selection process		facilitator
3.5 months prior	Individual invitations / communication to: <ol style="list-style-type: none"> 1. Selected applicants (requesting them to confirm their participation and if they need a hotel) 2. Guest invites reminding them that they need to take care of all of their own travel and accom (suggest hotel) 3. Applicants who have not been selected 	Selected applicants	facilitator
3 months prior	Begin arranging venue, accommodations, restaurant for group dinner	Hotel and restaurant	assistant, regional office
3 months prior	Confirm final list of participants	GAD, assistant	facilitator
3 months prior	First information note: who to contact for travel plans and visas	participants	facilitator GAD
3 months prior	Begin arranging travel plans for participants	participants	GAD
2 months prior	Request for participant information	participants	facilitator
2 months prior	Second information note: per diem information, hotel pickup information, hotel information, any other logistics	participants	facilitator
1 month prior	Request for participant expectations	participants	facilitator

facilitator – overall responsibility for, and leadership of, workshop

- ☐ design and send out advertising / call for nominations
- ☐ set criteria for participants
- ☐ make participant selection
- ☐ design and send out invitations and keep updated list of confirmations
- ☐ collaborate with design of logistics information
- ☐ design, send, receive and process participant questionnaires and surveys
- ☐ respond (or direct responses) to participant queries on logistics and contents
- ☐ design and send participant agenda
- ☐ develop facilitators agenda and clarify roles
- ☐ develop workshop curriculum
- ☐ develop PowerPoint presentation and workshop exercises
- ☐ develop participant binder
- ☐ develop facilitators' binder
- ☐ ensure all workshop materials are purchased
- ☐ prepare exercises / dynamics
- ☐ help organize group dinner
- ☐ ensure space is correctly set up
- ☐ during workshop: see facilitators guide
- ☐ develop budget and work with GAD officer to stay on budget
- ☐ manage any paid registration (if applicable)

Financial officer

- ☐ organize flights, visas, travel grants / per diems and keep updated list of participant travel & budget details
- ☐ deposit participants per diems into their bank accounts
- ☐ pay for hotel, taxi service, group dinner, etc.
- ☐ respond to participant queries on logistics

Meeting planner

- ☐ investigate, book and communicate with venue, accommodations & meals
- ☐ investigate and book transportation
- ☐ investigate and book group dinner; this includes communicating with Evaluation Unit and Regional Director for additional invite information

Assistant

- ☐ purchase and organize materials
- ☐ print, copy and assemble participant binders
- ☐ assemble participant directory
- ☐ register participants first day
- ☐ after workshop, post materials on www.idrc.ca/evaluation

Site Inspection Tips

The venue you select for your event can greatly impact your audio visual equipment needs. Aspects of a facility can impact not only what equipment you need, but also how effective that equipment may be of your presenters and the audience. Things to keep in mind during your site visit include:

Questions to ask at the site inspection

- Does the facility have a contract with or recommend a particular supplier?
- What are the union jurisdictions (especially in convention centers)?
- Charges for setup or move-out days?
- 24-hour hold on rooms: Is it automatic or is there an extra charge? (This can affect audio visual costs if repeated setup and tear downs are necessary.)
- Who locks and unlocks rooms? When? Is security a problem? Does additional guard service need to be hired overnight?
- Is engineer/in-house contractor on duty full-time? If not, what hours?
- Is loading/unloading area and service elevator accessible to outside contractors for bringing in equipment? Is there a secure storage area for audio visual equipment?
- What is provided by the facility as part of normal setups? Lecterns? Blackboards? Easels?

Floor plans don't always show the following, so during the room inspection look for:

- Clear ceiling heights. What is the "true" ceiling height?
- Low hanging chandeliers and other objects that affect ceiling height
- Columns/obstructions
- Mirrors
- True room dimensions, capacities
- Windows. Can they be blacked out with existing drapes or does a contractor need to come in and drape them?
- House phones in the room. Can they be disconnected?
- Portable walls. Is sound bleeding a problem?
- Carpeting. (Concrete floors can cause sound to "bounce around.")
- Entrances/exits

- What doors can/cannot be blocked due to fire regulations?
- Do doors squeak, close securely, lock automatically when shut?
- Will access to a room by latecomers distract the audience? Will light from outside when the door opens wash out the screen?
- Is there ample space for audience and audio visual setup? (AV can take up to 50% more than normally allocated for audience size.)
- Is there a permanent stage in the ballroom? Is it feasible for your use? What features does it already have installed?
- Are there any intercom headsets or communication systems installed in the room?
- What is the location of the sound/projection room? Is it feasible to use for your presentation?

Sound System Considerations:

- Who handles sound requirements?
- House staff (i.e., engineering)
- In-house contractor (outside company)
- Outside contractor
- Is there a sound system installed in the room? Is it good quality? Is it complete? (Sometimes only speakers are installed and an amplifier must be brought in with a microphone.) **ASK FOR A DEMONSTRATION!**
- If no sound system is installed, is one realistically needed for the size of the room? (Don't blanket order "one mic in each room.") If it is needed, what is the best way to install sound?
- Portable sound lecterns?
- Auxiliary sound systems with amplifier and separate speakers?
- If recording in meetings, can you patch out of the house system? Is an in-room location needed, or will a central amplifier location allow recording from a remote location?
- Who provides access to the house sound? Is there a "patching" fee?

Lighting Control Considerations:

- Are they inside the room? Easily accessible? Dimmable?

- Can overhead lights be turned out individually, especially behind any rear screen setup?
- Can a remote blackout/dimmer switch be run to a projection platform or lectern?
- Are follow spotlights available? From whom?
- If special stage lighting is to be installed, what are restrictions or provisions for hanging them from ceiling (or any other objects)?
- Is an airlift or cherry picker available from the facility? What is the charge for this?

Electrical Considerations:

- Where is the source for auxiliary electrical supply for lighting, multiple projection? Who provides? Charges?

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throughout the binder, you will find information, descriptions and templates that will help you accomplish the tasks set out in the timeline.

5- 6 months before:

- ☐ decide on what type of workshop you want to hold (demand)
- ☐ decide where and how many people
- ☐ determine facilitator(s) [recommendation is to have 1 facilitator for every 10 – 15 people]
- ☐ design & send out advertising and / or call for nominations
- ☐ make participant selection
- ☐ send out letters of invitation and confirm participation

4 months before:

- ☐ book venue and accommodations
- ☐ arrange plane tickets, travel grants and visas
- ☐ send out logistical information to participants
- ☐ organize airport pickups
- ☐ organize group dinner and/or other social events

2-3 months before:

- ☐ send out questionnaires to participants
- ☐ sent participants 4-pager on OM , websites, participant agenda
- ☐ develop detailed facilitator's agenda
- ☐ prepare curriculum
- ☐ develop Powerpoint presentation and group exercises
- ☐ photocopy and put together participant binders
- ☐ order books
- ☐ order materials
- ☐ organize case studies

1 month before:

- ☐ develop welcome package
- ☐ obtain all materials and ship ahead of time if necessary
- ☐ remind participants to send back any pending questionnaires
- ☐ send final room bookings to hotel
- ☐ design & print name tags and certificates
- ☐ reserve equipment

- ☐ finalize case studies with participants and ask them to choose groups;
finalize these groups

1-2 weeks before:

- ☐ final confirmation with hotel
- ☐ review facilitation tips
- ☐ develop “things still missing” list
- ☐ polish facilitators binder & review

1-2 days before the workshop:

- ☐ have welcome packages ready in hotel
- ☐ set up workshop space
- ☐ write up agenda, parking wall, and prepare any other visuals
- ☐ equipment check
- ☐ material check
- ☐ buy decorations for the room (flowers, candy, “toys”)
- ☐ relax!

during the workshop:

- ☐ have facilitators sheets handy
- ☐ pay attention to explicit and “hidden” participant demands and adjust accordingly
- ☐ review notes and plan for next day every night
- ☐ get enough sleep!

after the workshop has ended:

- ☐ conduct an after action review with facilitators and all organizers and include any improvements / changes to exercises and powerpoint presentations
- ☐ send letter to POs / others who nominated participants to thank them and remind them of follow-up with their participants
- ☐ send any materials promised to the participants
- ☐ review and summarize participant evaluation

managing your time

To organize an effective workshop often requires the time and effort of different people. To complete the task outline in the above timeline required the time of 5 different people (with estimated time dedicated to their tasks):

facilitator / organizer – communicating with participants on a daily basis, developing materials, instruction and follow-up with all the other people listed below, delivering workshop and follow up	27 days (about 200 hours)
facilitator – developing workshop materials, delivering workshop, photocopying and general emailing	12 days (about 95 hours)
administrative assistant – certificates, printing, assembling, emails	65 hours
logistics coordinator - venue selection, contract negotiation, logistics to the hotel, recapitulation of the agenda with consultant, revision of invoices, payment	60 hours
GAD officer – arranging flights, travel grants, visa letters, deposits, general communications	60 hours (2 hours per participant)
regional administrative assistant – booking restaurant, researching hotel and restaurant, answering email queries	5 hours

TOTAL

485 hours (or roughly 60 days)

workshop venue

- ☐ Space – is there enough room for facilitators to walk about; for participants not to feel cramped? Is there room to break off into groups and do group work?
- ☐ Tables – are there round tables available?
- ☐ Light – is there enough light (but also a means to darken the room for viewing of Powerpoint presentation)?
- ☐ Noise – is there any noise distraction in the area (traffic, construction)?
- ☐ Wall space – is there enough wall space to hang flipchart / group work?
- ☐ Cleanliness – is the room / general area well maintained?
- ☐ Temperature – can temperature be regulated?
- ☐ Bathrooms – are there men's and women's washrooms close by?
- ☐ Package deals – what is included in the price? Lunch, breaks, water, equipment?
- ☐ Equipment – what does the venue have? (screen, white board, LCD projector, extension cords, outlets, adaptors)
- ☐ Food – is food provided or does it have to be catered separately? Are there vegetarian / Halal / allergy options?
- ☐ Location – is the venue close to accommodations, easy to get to, etc.?

accommodations

- ☐ Cleanliness – are the rooms clean?
- ☐ Private rooms – can each participant have his/her own room?
- ☐ Location – is it in a safe neighborhood? Are participants able to venture out at night?
- ☐ Breakfast – is breakfast included?
- ☐ Transportation – is there shuttle to and from airport?
- ☐ Services – does the hotel provide services such as confirming flights?
- ☐ Internet – is there Internet access (in the rooms, in a business centre)?
- ☐ Restaurant – is there a restaurant in the hotel or options nearby?

A participant welcome package can include the following:

- ☐ name tags for workshop (put hotel name, address and phone number on back of name tag)
- ☐ map of town
- ☐ information on area / city
- ☐ safety tips
- ☐ banks and exchange rate
- ☐ hotel address and phone number
- ☐ venue address and phone number (if different from hotel)
- ☐ emergency phone numbers
- ☐ airline phone numbers
- ☐ workshop agenda and location of training room
- ☐ transportation information (taxis, etc.)
- ☐ restaurant suggestions
- ☐ reminder of what their per diems cover
- ☐ weather and clothing
- ☐ internet facilities
- ☐ air travel documents and reconfirmations
- ☐ special needs (religious, food)
- ☐ currency / tipping
- ☐ medical / vaccinations
- ☐ websites of additional information

criteria for selection

- ☐ The participant is IDRC staff or an IDRC project partner working in the region
- ☐ The participant has been nominated by a PO
- ☐ The PO has clearly stated the reason why the participant should be selected
- ☐ The PO has clearly stated how he or she will support the participant after the workshop
- ☐ There is a there is a regional network of support upon which the participant can draw from
- ☐ There is more than one participant from the same project / program attending the workshop
- ☐ The participant can be hired by others to help them use OM (i.e. consultants)

	Name of participant	Designation and contact information	Nominated by	Rationale for nomination	Description of post-workshop application
1					
2					
3					

Outcome Mapping Training in Cape Town, South Africa: Open for Nominations

When: January 23rd – 26th, 2007

Where: Cape Town, South Africa

The Evaluation Unit is offering a four-day training on Outcome Mapping (OM) from January 23rd to 26th 2007 in Cape Town, South Africa. Sarah Earl and Kaia Ambrose will conduct the training, with the support of OtherWise, a South African evaluation consulting firm.

IDRC's Evaluation Unit (EU) is mandated to help build evaluation capacity and promote the use of evaluation within the Centre and in Southern research institutes. IDRC has identified opportunities to develop existing regional capacity related to innovative, use and learning oriented evaluation. The Outcome Mapping (OM) training is intended to both meet existing training demands of IDRC partners and staff and to build OM capacity in the region.

At the end of the four-day training, participants will be able to:

- Understand and convey the pros and cons of using OM
- Begin to apply OM in their institutions and projects
- Create an M&E plan tailored to the specific needs of the project
- Combine OM with existing M&E methods
- Explore using OM in research settings and projects
- Join the international community of OM users

The training is open to:

- IDRC staff based or working in the region with an interest in supporting the use of OM and evaluation in their work and programming;
- IDRC partners in Africa who have a commitment and ability to use OM and evaluation in their projects, programs or organizations and have support from their IDRC program officer.

All participants must be nominated by an IDRC staff member.

If you want to be trained: If you are interested in participating in the training yourself, please send an email to Kaia Ambrose (kaia_ambrose@yahoo.ca) by **October 6th**, indicating how the training will be relevant to your work at IDRC. Preference will be given to candidates who can demonstrate a need and ability to use OM and evaluation in their work.

How to nominate partners: If you have partners who are interested in receiving this training and who you would like to nominate, please send a brief email to Kaia Ambrose (kaia_ambrose@yahoo.ca) by **October 6th 2006**. Preference will be given to partners that IDRC staff are committed to supporting in their monitoring and evaluation work post-workshop. Please include the following in your email using the **attached format**:

- Name of suggested participant and their position within their organization
- Full contact details (name of organization, telephone, address, email)
- Rationale for nomination
- Description of how the participant will be supported in their post workshop monitoring and evaluation work (e.g. through existing IDRC projects, PO mentoring, etc.)

Before you nominate a person, please first ensure that they will be available on the dates of the training.

Space at the training is limited. Due to high travel costs, and because Outcome Mapping workshops have already recently been offered in Asia and Latin America, this training is only being offered to participants working / based in Africa.

Those selected for the training will be advised by October 15th.

Funding: The Evaluation Unit will fully fund the costs of IDRC partners to attend the training (including tuition, travel, accommodations, and per diems). Tuition will be covered for IDRC staff, but travel costs for Centre staff must be paid for by your own team.

If you want to learn more about Outcome Mapping, please go to:
www.outcomemapping.ca or www.idrc.ca/evaluation

If you have any questions, please contact Kaia Ambrose

an outcome mapping workshop is usually more effective when:

- ✓ there is a clear need and interest to attend the training – on the part of the nominating PO and on the part of the participant
- ✓ there is clear and identified support for follow-up, i.e. the participant will receive support from his or her PO in the application of outcome mapping
- ✓ there is more than one person from a project or program who is attending the workshop
- ✓ participant expectations have been identified ahead of time

Not all people may find a training the most effective or satisfactory way to learn about outcome mapping. Indeed, training in outcome mapping is not a pre-requisite to understand and use outcome mapping. If a project or PO is interested in applying outcome mapping, he or she should also consider the possibility of a direct application workshop, rather than a training event (but that still has capacity building components built into it).

discussing the request for attending / nominating a participant

- 1. Who requested?** Who wants the training? Both the nominated participant and the PO? How enthusiastic are they?
- 2. Facilitation/Training** What do you want/need? Facilitation (application of OM) or training?
- 3. Purpose** Why do you want to send someone / attend the workshop? (i.e. "Just to get training"? Apply in project or program for planning, monitoring or evaluation?)
- 4. OM/Other** Why do you want training in OM? Why is OM particularly important? (What is it that you think OM can offer / fill your M&E needs? Would another methodology be more appropriate?)
- 5. Desired Outcomes** What is your desired outcome for this training?
 - Best case scenario
 - Broader intent (to program, regional office, partners)
 - Side benefits
- 6. Support** How will the PO support the participant after the workshop is over? How will the participant receive technical support from using OM?
- 7. Current M&E** What existing M&E and reporting systems or approaches are they currently using or planning to use?
- 8. Intended Use(s)** How are the participants going to use the training?
- 7. Participant Buy-in
Management Buy-in** Have participants and their high-level/management bought in to the need for the training?



OUTCOME MAPPING

A practical, flexible and participatory approach to
planning, monitoring & evaluation

Outcome Mapping...

- Assesses social change in development projects or institutional initiatives
- Allows for increased participation of partners and stakeholders in the planning, monitoring & evaluation process
- Adapts to the specific monitoring & evaluation needs of the program
- Integrates monitoring & evaluation into the project from the planning stage
- Provides tools and vocabulary for understanding the complexity of social change

First introduced by the Canadian-based International Development Research Centre (IDRC) in 2000, Outcome Mapping (OM) has been used in projects, programs and organisations in Latin America, Africa, Asia, Europe and Canada. A growing body of donor agencies, NGOs and monitoring and evaluation professionals are adopting OM because it helps them to address issues such as:

- Social learning and the multi-perspective logic and responsibility systems to which different stakeholders contribute
- Behavioural change in complex systems as the underlying cause of development change
- Capacity for networking and creating meaningful partnerships
- Learning capacity of development organisations
- Multi-tiered accountability and contribution of development interventions
- Unexpected results and tools to measure such results

Benefits of OM for program and project managers

Outcome Mapping is a flexible methodology that can be combined and used with other planning, monitoring and evaluation methodologies. Outcome Mapping will help project managers and staff:

- Focus on how organisations facilitate change rather than how they control or cause change
- Recognise the complexity of change processes and of contexts in which they occur, based on peoples change in behaviour
- Move to a better balance of learning and accountability
- Locate an organisation's goals within the context of larger challenges
- Encourage and guides innovation and risk-taking
- Integrate qualitative information with quantitative

Participation and community-building

Outcome Mapping is designed to help build relationships, as well as assesses them. The method enables team members participate in the planning process and also encourages organisations to engage their partners in an open and transparent dialogue about strategies and envisioned outcomes. Outcome Mapping helps a programme or an organisation be specific about its partners, the changes it expects to see, and the strategies it employs and, as a result, be more effective in terms of the results it achieves. It is particularly valuable for monitoring and evaluating community oriented projects whose results and achievements cannot be understood with quantitative indicators alone. OM helps provide the deeper insights of a qualitative, contextualized story of the process.

Workshop benefits

The workshop is intended to provide project managers and staff and other development and/or M&E specialists with the conceptual and practical aspects of Outcome Mapping, while adapting it to their own specific project and program needs. At the end of the training, participants will be able to:

- Understand and convey the pros and cons of using OM
- Begin to apply OM in their organizations, programs and projects
- Create an OM design and M&E plan tailored to the specific needs of their project
- Combine OM with existing M&E methods and tools
- Apply effective facilitation techniques for using OM

How will you learn?

The course methodology will embody the participatory values that are at the core of OM, combining theory with group discussion, individual reflection, small group practice and case studies. Course materials include a training manual, CD-Rom containing case studies and information in three languages (English, French and Spanish), the book *Outcome Mapping: Building Learning and Reflection in to Development Programs* by S. Earl, F. Carden and T. Smutylo, background articles and class worksheets. The workshop will be conducted in English.

Workshop organization

The workshop is organised by the Latin American Centre for Outcome Mapping and the Association "Raíz".

Natalia Ortiz is the co-founder of Association Raíz, a non-profit organization established in 2000, which brings together Latin American consultants in a learning community working mainly in strengthening organizational capacity to manage, monitor and evaluate developmental projects and programs. Natalia has worked since 1997 as an international consultant in planning, monitoring and evaluation. Previous to this work, she was extensively involved for 9 years in sustainable development initiatives in areas of armed conflict in rural Colombia. She has a M.A. in Agriculture and Rural Development from the Institute of Social Studies of The Hague, Netherlands, and a background in economics from Los Andes University in Bogotá, Colombia. For more information about her work, visit: www.asraiz.org or contact her at: asraiz@epm.net.co

Kaia Ambrose is a consultant with a strong background in community-based natural resource management, project management, facilitation, training and monitoring and evaluation, with field experience in Latin America, Africa and the Middle East. She is currently involved in CARE Canada's Programme Agreement, and managing projects in several countries on HIV/AIDS, sustainable agriculture, youth engagement, civil society and gender. Previously, she had spent the last seven years in Latin America, coordinating and directing a wide range of natural resource management projects and research initiatives. She holds a BA in Comparative Development Studies from Trent University (Peterborough, Canada) and a Master's degree in Community-Based Natural Resource Management from the Catholic University of Ecuador. kaia_ambrose@yahoo.ca

Outcome Mapping:
Practical, Flexible, Participatory Approach to
Monitoring and Evaluation
 a 4-day workshop. August 9-12, 2006
 IWMI, Colombo, Sri Lanka

An integrated system of planning, monitoring and evaluation, Outcome Mapping

- Measures social change in development projects or corporate and institutional initiatives
- Brings the stakeholders into the M&E process
- Fosters social as well as organisational learning
- Strengthens partnerships and alliances
- Helps create an open organisational culture
- Provides tools and vocabulary for understanding the complexity of social change

First introduced by the Canadian-based International Development Research Centre (IDRC) in 2000, Outcome Mapping (OM) has been used in projects, programs and organisations in Latin America, Africa and Asia. A growing body of donor agencies, NGOs and monitoring and evaluation professionals are adopting OM because it helps them address issues that other, more traditional methods do not consider. These **questions include:**

- How do we move beyond attribution to consider contribution to social change?
- How can we capture the richness of what is occurring in our projects without relying only on anecdotal evidence?
- How do we get our partners, colleagues and stakeholders more involved in the project?
- How do we integrate M&E into the project from the planning stage?
- How do we decide what to monitor and evaluate?
- How do we notice, explain and respond to unexpected results?
- How do we deepen our understanding of the change processes we are promoting?

At the end of the four-day training, **participants will be able to**

- Understand and convey the pros and cons of using OM
- Begin to apply OM in their institutions and projects
- Create an M&E plan tailored to the specific needs of the project
- Combine OM with existing M&E methods
- Effectively use facilitation techniques in M&E contexts
- Join the international community of OM users

A **flexible, useful tool** that can be applied in all phases of project design and implementation. Outcome Mapping can help:

- | | |
|---|---|
| Project managers and staff | <ul style="list-style-type: none">• Construct a common vision of what they hope to accomplish• Make M&E an integral part of the project• Obtain useful feedback on the work in progress• Make better strategic use of funds• Prepare reports to funders with greater ease and clarity• Use M&E to reflect and learn from the process |
| Institutional partners and community members | <ul style="list-style-type: none">• Have a voice in the planning and M&E process• Understand their role• Collaborate more effectively• Increase their ownership of the initiatives |
| Funders | <ul style="list-style-type: none">• Understand what is happening in a project• Receive qualitative as well as quantitative information• Learn along with the organisations they fund |

The course methodology will embody the participatory values that are at the core of OM, combining theory with group discussion, individual reflection, small group practice and case studies. Course materials include a training manual, CD-ROM containing OM information in three languages (English, French and Spanish), the book *Outcome Mapping: Building Learning and Reflection in to Development Programs* by S. Earl, F. Carden and T. Smutylo.

Facilitators:

Kaia Ambrose is a consultant with a strong background in community-based natural resource management, project management, facilitation, training and monitoring and evaluation, with field experience in Latin America, Africa and the Middle East. She is currently involved in CARE Canada's Programme Agreement, and managing projects in several countries on HIV/AIDS, sustainable agriculture, youth engagement, civil society and gender. She is also collaborating with IDRC to develop and disseminate Outcome Mapping. Previously, she had spent the last seven years in Latin America, coordinating and directing a wide range of natural resource management projects and research initiatives. She holds a BA in Comparative Development Studies from Trent University (Peterborough, Canada) and a Master's degree in Community-Based Natural Resource Management from the Catholic University of Ecuador.
kaia_ambrose@yahoo.ca

Language: The workshop will be conducted in English.

Location: The workshop will be held at the International Water Management Institute (IWMI) Headquarters in Colombo, Sri Lanka.

Schedule: The workshop sessions will run from 9 am – 5 pm, Wednesday - Saturday. A detailed program will be provided in advance.

Space limited to 25 participants

For more information contact: Sanjini De Silva at sanjini.desilva@cgiar.org

For more information on Outcome Mapping, visit: www.outcomemapping.ca

nomination template for outcome mapping workshop

template nomination format

a) Your name, designation and program:

b) Person you are nominating, their designation and program they are associated with at IDRC:

c) Full contact details of candidate (name of organization, telephone, address, email):

e) Rationale for nomination:

f) Description of how the participant will be supported by you or others in their post workshop planning, monitoring and evaluation work:

confirmation letter

January 4th, 2007
Ottawa, Canada

Dear colleagues,

After much juggling of dates and schedules, we were finally able to set the dates for the next Outcome Mapping training workshop, which will take place in Cairo, Egypt from Sunday, May 13th until Wednesday, May 16th, 2007.

We realize many of you confirmed your interest in assisting this workshop. We would now like to ask you to make a final confirmation, based on these dates, of your participation in workshop.

The IDRC Evaluation Unit will fully fund participant costs to attend the training (including tuition & materials, travel, accommodations and per diems). We kindly remind you that IDRC staff must pay for their own travel and accommodation.

The workshop will be conducted in English. Interpretation will not be provided.

Again, demand for this training is very high and we do have several people remaining on our wait list. Please confirm your attendance with me by **Friday, January 27th, 2007**.

Once we have your confirmation, we shall send you more details on your travel grant, air tickets and any other logistical requirements and pre-workshop preparations.

If you have any questions, please do not hesitate to contact me.

Kind regards,

(Name)

Workshop organizer and facilitator

Dear Outcome Mapping Workshop Participants,

We are busy making logistical arrangements and also putting the finishing touches on the content for the Outcome Mapping workshop. Your facilitators are looking forward to meeting all of you and engaging in what we are sure will be a lively four days of discussion and learning.

Because we are approaching April, which is a busy month for me, I wanted to send you the first of two major logistical / content emails. I have included three important attachments:

1. Participant information questionnaire: this questionnaire will allow us to get to know each other a little better at the workshop, as well as help us make the workshop as accommodating and comfortable for you. Please send this back to me as soon as possible.
2. DRAFT workshop agenda: we wanted to give you an idea of how the workshop will unfold over the four days. The facilitators will still be making minor adjustments to the agenda in the coming months. You will receive a final agenda in your material pack at the beginning of day 1. Please note workshop times and the "special events" we have planned (a group dinner; individual consultations on the last day). Any questions or clarifications, please do not hesitate to contact me.
3. Logistical information: many of you already have this information, but a few do not which is why I am sending it to everyone. Of special importance to all is the workshop venue: please note location (address and phone numbers). If you have any logistical concerns, please do not hesitate to contact the financial officer.

If you would like additional information on Outcome Mapping before the workshop, feel free to take a look at the 4-page OM brochure or the longer manual.

We like to request that you make a special effort to read the forward in the OM manual before the workshop begins. This is an inspiring yet brief way to introduce yourself (or remind yourself) of the essence of OM as expressed by Michael Quinn Patton

Finally, you may want to consider joining the OM learning community (www.outcomemapping.ca) to learn more about what others are doing with OM

around the world and the challenges and innovations they have experienced.

Many thanks in advance for returning the questionnaire to me, and again, please feel free to contact me if you have any questions or concerns.

Warm regards,

(Name)

Workshop Trainer and Organizer

Dear _____,

Thank you for confirming your participation to the Outcome Mapping Training to be held in Cape Town, South Africa January 23rd to 26th, 2007. In order to get many of the logistical arrangements started, we would like to bring your attention to three of them immediately:

a) Travel

(The financial officer) will be arranging your flights. Please contact her as soon as possible for information on flight options and finalizing your itinerary.

Please note that it is IDRC's policy to have tickets issued through our travel agent. Direct ticketing and reimbursement of ticket amount is not allowed. Tickets will be issued on most economical and most direct route with best possible connections.

Once your itinerary is finalized, we shall issue your travel letter and release funds towards your travel expenses. Please find **attached** the travel and banking information sheet which you should fill and return as soon as possible for transfer of travel funds.

b) Visas

Please check if you need a visa for entering South Africa. Once flights are confirmed, we will issue a formal letter of invitation for visa purposes if required. (The financial officer) will be providing these letters.

c) Accommodations

For those participants that the Evaluation Unit is supporting, arrangements have been made for stay of participants at the Breakwater Lodge which is also the workshop venue (<http://www.bwl.co.za/>). The Evaluation Unit will also be arranging airport pick up and drop off of the participants (more details to follow). Participants who wish to stay on after the workshop will be responsible to pay directly for their accommodation etc. Any additional charges such as room service, mini bar, telephone, laundry etc. will also have to be paid directly by the participants. We will be providing you with more information on the hotel in your information package.

For those participants whose accommodation is not covered by Evaluation Unit, please let us know if you would like us to reserve a room at the Breakwater Lodge for you. Upon arrival, you must present a credit card to the hotel for your payment.

If you do not require accommodations in Cape Town, please let us know.

Please feel free to contact us in case of any queries.

Kind regards,

(Name)

Workshop organizer and facilitator

Attachment: Travel and bank transfer information forms.

May 1st, 2007

Dear (Names),

As you know, the Evaluation Unit is organizing a training of IDRC project partners in outcome mapping May 13-16, 2007 in Cairo. I'm writing to send you the confirmed list of participants as there are many project partners from your region on the list and I thought you would be interested in knowing who is attending. The name of the Program Officer who recommended their participation is also on the list.

As a more general update, the planning for the workshop is going well and we really appreciate the logistical support that your executive assistant has provided. The workshop will be held at the Flamenco Hotel and a reception dinner is being held on May 15 at 19:30pm at the Saquoia restaurant. You are both most welcome to attend the reception dinner and if there is anyone else you think we should invite to the dinner, please let me know.

If you would like further information on the workshop, I'm happy to provide it. We're looking forward to seeing you in Cairo.

All the best,

(Name)

Outcome Mapping Training, Cairo, Egypt
13-16 May 2007

Hotel & Meals: We have arranged for your stay at the Flamenco Hotel (<http://www.flamenco.com.eg/cairo/>). The Centre will pay the hotel directly. The arrangement that we have with the hotel is bed and breakfast. Please note breakfast will be complimentary and lunch on training days will also be complimentary. Your per diems will cover dinner.

Flight reconfirmations: Airline reservations will be re-confirmed three days prior to departure.

Transportation: Transportation from the airport to the hotel is the responsibility of each participant. Your travel allowance is to cover this transportation. Make sure to change some money at the airport to pay for your taxi (there are banks before passport control). The airport can be chaotic, but finding a taxi is not difficult. Expect to pay between 70 and 95 Egyptian pounds.

Do:

- choose and take a limousine or cab from inside the airport; if you choose a limousine, then their controller will write down which car and the destination (Flamenco Hotel);
- especially with cabs, agree on the fare in the airport; pay when you arrive at the hotel;
- the driver will expect a tip (i.e. 10 Egyptian Pounds);

Don't:

- give your name (and especially room number) to anyone (driver, limousine company);
- pay in dollars (it gives too much room for negotiating and arguing on fare).

Training venue and schedule: The Outcome Mapping training will be held at the Flamenco Hotel <http://www.flamenco.com.eg/cairo/>. The training will start at 09h00 every day; however, on the first day of training (13 May 2007) please be at the training room earlier (i.e. 08h30) in order to pick up your name tag, receive your materials, etc. The training ends at 13h00 on 16 May 2007, followed by lunch. Please note that from 14h00 to 17h00 on 16 May 2007 has been kept open for optional consultation with the trainers. Lunch will be served at the hotel, as well as coffee breaks.

Address: 2 El Gezira El Wosta Street, Zamalek, Cairo
Telephone: +20-2-73 50 815

Group Dinner: You are cordially invited to join us for a group dinner on 15 May 2007, at 07:30 p.m. at Saquoia (more details to follow). This will be a casual event and an opportunity for all of you to interact with the trainers and a few friends and partners of the Centre in Cairo whom we will be inviting to the dinner. Please let us know if you will not be able to attend the dinner.

Immunization: No immunizations are needed for Egypt, however, please be aware that people coming from certain countries may be required to present their yellow fever vaccination certificate upon arrival. For a list of countries, please visit: <http://www.who.int/ith/countries/liste/en/index.html>

H5N1 Avian Influenza: Infection in humans has occurred in three distinct waves of activity, since late-December 2003. The current wave of activity has been ongoing since December 16, 2004. Egypt is one of the countries that has reported human cases of H5N1. As a precautionary measure, the Public Health Agency of Canada recommends that it would be prudent for travelers to consider the following measures: avoid unnecessary contact with domestic poultry and wild birds; ensure that all fowl (domestic poultry and/or wild birds) prepared for consumption is thoroughly cooked (juice runs clear and no visible pink meat) to eliminate the risk of infection; follow normal precautions regarding food storage, handling and preparation; and get your annual flu-shot. For more information on Avian Influenza, visit: http://www.voyage.gc.ca/main/sos/ci/current-en.asp?txt_ID=637

Safety: Egypt has recently experienced several terrorist attacks; visitors should maintain a high level of personal security awareness at all times and in all places, and exercise caution, especially in commercial establishments, government facilities and public areas, including tourist sites and other areas frequented by foreigners and, to the extent possible avoid frequenting such areas. Visitors should also monitor local developments and avoid crowds and demonstrations. While recently implemented security measures have made it more difficult for extremist groups to operate, Egypt remains one of a number of countries where a threat from international terrorism exists (<http://www.voyage.gc.ca/dest/report-en.asp?country=79000>).

Local customs: The work week in Egypt is Sunday through Thursday. Islamic practices and beliefs are adhered to in the country's customs, laws, and regulations. Common sense and discretion should be exercised in dress and behaviour. Visitors should dress conservatively (i.e. for women, knee-length or longer dresses and long sleeves are preferable and men should not wear shorts outside tourist areas).

Unescorted women are vulnerable to sexual harassment and verbal abuse. Please exercise caution if you are a woman and wish to go out alone.

<http://www.voyage.gc.ca/dest/report-en.asp?country=79000>

Internet Access: Wireless internet is available in the hotel rooms for a fee of 60 Egyptian Pounds a day. There are also Internet Cafés close to the hotel.

Weather: May is the beginning of summer in Cairo and can be quite hot with temperatures ranging from 35 to 38 degrees Celsius.

Dress: Dress for the conference is business-casual. The workshop venue will most likely be well air conditioned, so bring appropriate clothes / covering (i.e. a light jacket, shawl or sweater) so that you do not get chilled.

Currency: Egyptian Pound (EGP). 1 USD = 5.7 EGP.

Time Zone: Cairo is Standard time zone: UTC/GMT +2 hours (Daylight Savings begins Friday, April 27th, 2007). The World Clock web site can be useful for calculating time differences (<http://www.timeanddate.com/worldclock/city.html?n=53>).

Voltage: 220V 50HzHz (European plug with two circular metal pins).

For a quick tourist brief on Cairo, visit: <http://wikitravel.org/en/Cairo>.

participant information questionnaire

Dear participant,

In order to help prepare to welcome you to the workshop and to ensure successful organization, we would like you to ask you a few personal and organizational questions:

Please return this questionnaire by Friday, March 30th, 2007.

Last Name (s):	
First Name(s):	
Title (Dr., Prof., Mr., Ms.):	
Gender (M/F):	
Name you wish to appear on your name badge:	
Name of project and organization you are working with/for:	
What is your role / position within that project:	
What IDRC program are you associated with (i.e. Focus Cities, EcoHealth, Acacia, etc.)?:	
Email address:	
Mailing address:	
Telephone:	
Fax:	
Working language:	
Other languages spoken:	
Citizenship:	
Country of current residence:	
Academic background:	
Please provide the name and number of a person we can contact in the event of an emergency:	
Do you have any special dietary needs? If so, what are they?	
Other special needs that we should know about?	
What three words would you use to describe yourself?:	
What are your favourite activities?:	

Case studies: We will be engaging in quite a bit of group work during the workshop. We would like to know if anyone has a particular case that they would be willing to use for the

group work (this would be a case in which you are interested in applying Outcome Mapping to). If you are interested, please briefly describe the case here (what type of project is it, who is involved, duration, length, main objectives and activities, etc.). *We will only be able to work with 4 or 5 cases, so if there are more, we will have a decision-making process within the workshop in order to determine which cases to work with.*

Other materials to share: We will provide tables for information, including material to give away (brochures, reports etc) and things that are for display only (photos, books or other documentation).

October 18th, 2006
Ottawa, Canada

Dear Anne,

Congratulations! Based on a nomination from XXXX, you have been selected to attend the Outcome Mapping training to be held at The Breakwater Lodge (www.bwl.co.za), Cape Town, South Africa from 23rd to 26th of January 2007. We really appreciate your interest and willingness to take time from your work to participate in this workshop. We hope that Outcome Mapping can contribute to your research project in important ways.

Please note that the Evaluation Unit of IDRC will fully fund your costs to attend the training (including tuition & materials, travel, accommodations and per diems).

OR

Our understanding is that you will be funding and arranging your own travel to and from Cape Town. The Evaluation Unit will fund your accommodations, per diems, tuition and materials.

OR

We understand that you will be funding and arranging your own travel to and from Cape Town, accommodations and per diems. If you would like a room booked in your name at the Breakwater Lodge, we can arrange that, but you will be expected to arrange your own payment upon arrival.

OR

We kindly remind you that IDRC staff must pay for their own travel and accommodations. Tuition will be covered for IDRC staff.

We would also like to remind you that the workshop will be conducted in English. Interpretation will not be provided.

Demand for this training is very high and we have a very long list of people remaining on our wait list. Therefore, as seats are very limited, please confirm your attendance with me by **Friday, October 27th 2006**.

Once we have your confirmation, we shall send you more details on your travel grant, air tickets and any other logistical requirements and pre-workshop preparations.

If you have any questions, please do not hesitate to contact me.

Kind regards,

(Name)
Workshop organizer and facilitator

October 18th, 2006
Ottawa, Ontario

Dear (participant),

Thank you very much for your interest in participating in the Outcome Mapping training in Cape Town. The Evaluation Unit received an overwhelming response to the workshop with 55 nominations in all. In order to run the workshop effectively, we cannot accept more than 25 participants, so we have tried to accommodate you by offering another workshop as quickly as possible following the Cape Town workshop. The Evaluation Unit will run a second training workshop in mid-April 2007, most likely in Cairo, Egypt (we are currently confirming details).

In order to reduce the travel time and costs, we have separated participants geographically, ensuring that multiple people from the same project / organization are at the same workshop. **We hope that you will consider joining us at the training workshop in Cairo in April.** If you are interested and available to attend this workshop mid-April, please confirm with me as soon as possible. If participation in the April workshop is not possible for you, please let me know and I will put you on a waiting list for the Cape Town training. Unfortunately we cannot guarantee a spot will become available for Cape Town.

We would like to remind you that the Evaluation Unit of IDRC will fully fund the costs of IDRC partners to attend the training (including tuition & materials, travel, accommodations and per diems). IDRC staff must pay for their own travel and accommodations. We would also like to remind you that the workshop will be conducted in English. Interpretation will not be provided.

We will confirm exact dates and location as soon as possible. If you have any questions, please do not hesitate to contact me.

Sincerely,

(Name)
Workshop organizer and facilitator

Outcome Mapping Training
May 13 – 16, 2007 – Cairo, Egypt



sample participant agenda

Day 1: Sunday, May 13

- 8.30** Registration, “meet and greet”
- Morning** Welcome & introductions; workshop objectives
 Personal monitoring journals
 Guest presentation: a case study of using OM
 Reflections on Monitoring and Evaluation
 OM overview
- Afternoon** Intentional Design: Vision
 Intentional Design: Mission
 Intentional Design: Boundary Partners
- 5.30** Close

Day 2: Monday, May 14

- 9.00** Workshop begins
- Morning** Intentional Design: Outcome Challenges
 Intentional Design: Summary Framework
 Intentional Design: Progress Markers
- Afternoon** Intentional Design: Strategy Map
- 5.30** Close

Day 3: Tuesday, May 15

- 9.00** Workshop begins
- Morning** Intentional Design: Organizational Practices
 Monitoring and Evaluation: overview, planning
- Afternoon** Monitoring and Evaluation: implementing, use
- 5.30** Close
- 7.30** Group dinner

Day 4: Wednesday, May 16

- 9.00** Workshop begins
- Morning** Guest presentation
 Analyzing usefulness of OM in your context
 Closing of workshop
- Afternoon** Individual / group consultations with the facilitators

October 18, 2006

(Participant name and contact information)

Dear Sir,

This is to confirm that Canada's International Development Research Centre (IDRC) invites you to attend the Outcome Mapping Users Workshop in Niamey, Niger. This event will be held on January 13 and 14 2007, directly preceding the African Evaluation Association (AfrEA) conference (www.afrea.org) taking place January 15 through 21, 2007.

IDRC will support your return travel from (location). All agreed costs relating to your return travel and accommodation, including local costs to remain in Niamey for the African Evaluation Association Conference, are being covered by IDRC.

We look forward to your participation in this event. Please do not hesitate to contact me if you have any questions.

Yours truly,

Workshop organizer

Cc. Regional colleagues

Survey Monkey is an online questionnaire tool that is simple to use. You can create a questionnaire with up to 10 questions for free (more questions requires registration and payment). To create your questionnaire, go to: www.surveymonkey.com

A sample questionnaire might include the following:

1. Your full name
2. The project / program and organization you are working for
3. Which of these best describes your work responsibilities (tick more than one if necessary):
 - a. Mainly Monitoring & Evaluation (M&E)
 - b. Research
 - c. M&E as a secondary aspect of my work
 - d. Knowledge Management
 - e. Organizational learning
 - f. Other (please specify)
4. Which of these best describes your organization (tick more than one if necessary):
 - a. A funding agency
 - b. An implementing agency
 - c. A government agency
 - d. A network
 - e. A research institution
 - f. A policy advocacy institution
 - g. A teaching / training organization
 - h. Other (please specify)
5. Have you read the Outcome Mapping (OM) manual?
 - a. Yes, from beginning to end!
 - b. Yes, bits of it
 - c. No
 - d. No, but I plan to before the January training
6. What experience has your organization had with OM so far?
 - a. We have heard of it, but nothing more
 - b. We have talked about using it, but nothing more
 - c. We are planning to try it out on a small scale
 - d. We are planning to try it out on a large scale
 - e. We are using it on a small scale
 - f. We are using it on a large scale
 - g. We were using it, but not now
 - h. Other (please specify)
7. What is the most important thing you want to get from this training event?
8. How do you anticipate using OM in your work after the workshop?

May 20th, 2007

Dear colleagues and friends,

We hope you have all arrived safely back home and with renewed energies after 4 days of learning, networking and participating!

The facilitator has arrived back in Canada to work on incorporating your very valuable suggestions and reflections (that you gave us throughout the workshop as well as in the final evaluation) into new OM materials. Colleagues are in Beirut to deliver another OM workshop and explore the possibility of tailoring OM for the MENA context. We can already see that there will be a rich resource of human talent in the region for facilitating, coaching and networking on and around OM.

We would like to thank each of you for the diverse contributions, perspectives and the serious and thoughtful participation you brought to the workshop; you made the workshop an overall positive experience with many new innovations and ideas to bring to Outcome Mapping. It is this sort of thinking and creativity that social change needs.

It was a pleasure to get to know you a little bit in the four days we spent together, and we look forward to new seeing and hearing from you in the future.

Don't forget to join the OM community and share your experiences using OM!
www.outcomemapping.ca

With warm regards,

(The workshop organizers)

May 30th, 2007

Dear colleagues,

We have recently delivered two very successful Outcome Mapping workshops in Cairo and Beirut. We had great groups of partners at both who have a number of interesting ideas on how to take forward OM in their work. Many partnerships were forged and new ideas took shape as the group bonded during the workshops.

We think the nomination process helped to identify people with a readiness to use, modify, adapt and potentially train in OM and look at contextualizing OM for use in the MENA region. Part of the nomination process, as you will recall, was a commitment by the nominating PO to support these partners in applying OM in their work. This support could take various shapes, including providing additional training or funding for OM work through existing projects, project development etc., and we know that many of you have already begun to do this with your partners. We think it was particularly important that the POs who were at the workshop worked in close contact with their partners. From the workshop evaluation, the participants also expressed the value of the group work we did within the workshop as they were able to exchange with other partners working on the same thematic area.

All of us in the evaluation unit look forward to hearing more about how the use of OM evolves and providing input and support, if needed, as you take this forward with your partners. Another support mechanism for your partners as they use outcome mapping, is the outcome mapping virtual learning community. We'd encourage you and your partners to join at www.outcomemapping.ca.

A complete list of partners, as well as the workshop materials and evaluation, will soon be posted on the internal website.

Thanks again for taking the time to nominate this great group of partners.

(The workshop organizers)



Outcome Mapping Training Workshop
May 13th – 16th, 2007
Flamenco Hotel, Cairo, Egypt

welcome letter

Dear Participant,

Welcome! To the Flamenco Hotel, to Cairo and to the Outcome Mapping workshop. We hope you arrived safely and that you have a chance to rest before we start an intense four-days together.

Please note that the Outcome Mapping workshop will begin on Sunday, May 13th at 8:30 a.m. at the Flamenco Hotel in the Valencia Room. If you have any questions or concerns about the workshop, please do not hesitate to contact me in my room.

We remind you that breakfast is included with your accommodations, and that we will be having lunch at the hotel as well during the workshop. IDRC will pay accommodations, breakfast and lunch (on the days of the workshop) directly. Please remember that you are responsible for any incidental charges you incur (beverages, laundry, phone calls, etc.) as well as dinner (and lunch on non-workshop days). If you have any questions regarding logistics for the workshop (hotel, food, per diems, etc.), please contact me.

The hotel will be able to advise on taxis, Internet, restaurants nearby for dinners.

Finally, I would like to again extend an invitation to you to join us for a group dinner on May 15 at 7:30 p.m. at the Saquoia restaurant. We will arrange for transportation from the hotel to the restaurant. If you are unable to attend the dinner, please let me know as soon as possible.

See you soon!

(Facilitator)

Outcome Mapping Facilitator's Summary Sheets

Workshop Process Checklist

Stage 1: Intentional Design

Step 1. Vision	~
Step 2. Mission	~
Step 3. Boundary Partners	~
Step 4. Outcome Challenges	~
Step 5. Progress Markers	~
Step 6. Strategy Map	~
Step 7. Organizational Practices	~

Stage 2: Outcome & Performance Monitoring

Step 8. Monitoring Priorities	~
Step 9. Outcome Journal	~
Step 10. Strategy Journal	~
Step 11. Performance Journal	~

Stage 3: Evaluation Planning

Step 12. Evaluation Plan	~
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Instructions for Facilitators

- T Summary sheets are summaries of materials used for training and facilitation of Outcome Mapping – they do not replace these materials
- T Facilitators should review the appropriate sections of *Outcome Mapping: Building Learning and Reflection into Development Program* by Sarah Earl, Fred Carden, and Terry Smutylo (IDRC, 2001) before the workshop session. The summary sheets are for quick reference only to clarify issues, break deadlocks, etc.
- T Make this process your own, and start with what your group needs – these summaries are intended to help you, but ultimately you should feel empowered to adapt sessions to your group's needs.



Stage 1: Intentional Design

Step 1: Vision Statement

Definitions

The **Vision** reflects the broad human, social & environmental betterment in which the program is engaged and to which it is contributing.

Facilitation Questions

Imagine that in 3 –5 years the program has been extremely successful. What changes will you have helped bring about? What are your partners doing differently? What have they achieved? In essence, what would total success look like?

Facilitation Tips

The vision reflects the broad human, social, and environmental betterment in which the program is engaged while the mission is that “bite” of the vision statement on which the program is going to focus.

Workshop Exercise

The output of this exercise will be a vision statement of about one-half page.

Timing

2 hours, when combined with the Mission workshop exercise in Step 2.

Further References

Facilitation Manual: Step 1, pp 33-36



Stage 1: Intentional Design

Step 2: Mission Statement

Definitions

The **Mission Statement** is that “bite” of the Vision Statement on which the program is going to focus.

The **Mission Statement** describes how the program intends to:

- Operationalize its role in support of the vision.
- Support the achievement of outcomes by its boundary partners
- Remain effective, efficient, relevant & sustainable.

Facilitation Questions

How can the program best support or contribute to the achievement of the vision? What areas do you need to work in? What do you need to do?

Facilitation Tips

- Mission and Vision are often combined in the group’s discussion – the facilitator can separate them in the drafting.
- You can carry out an email survey in advance to create a draft vision & mission before the workshop starts.
- Make sure there is a common language and purpose among the group by the end of this part of the process.

Workshop Exercise

The output of this exercise will be approximately a half-page Mission Statement for the program.

Timing

2 hours when combined with the Vision workshop exercise in Step 1.

Further References

Facilitation Manual: Step 2, pp 37-40



Stage 1: Intentional Design

Step 3: Boundary Partners

Definitions

Boundary Partners are those individuals, groups & organizations with whom the program interacts directly to effect changes & with whom the program can anticipate some opportunities for influence.

Facilitation Questions

In which individuals, groups or organizations is your program trying to encourage change so that they can contribute to the vision? With whom will you work directly?

Facilitation Tips

- The concept of boundary partners is quite specific in Outcome Mapping and it may take the group some time to catch on to the notion of planning, monitoring and evaluating around the people, organizations, and groups with whom they work directly. It is crucial to the development of the monitoring system so the facilitator may need to explain the concept quite a few times.
- It can be helpful to point out that the notion of boundary partners is nested. (i.e. boundary partners are a subset of a program's stakeholders) The program's boundary partners have boundary partners of their own and even if this is whom the program ultimately hopes to reach, they are trying to do that through the people, organizations, and groups with whom they work directly therefore this is where they should plan for and assess results.
- At first, the number of boundary partners identified may seem overwhelming in number. Try to group similar boundary partners according to the type of behavioural changes sought. Conversely, once categories of behavioural change have been identified, new boundary partners can be added to other similar ones. Try to reach a small number of similar types of boundary partners, as defined by the kind of behavioural change you are seeking.
- Differentiate between boundary partners & strategic partner (i.e. those with whom the program works but in whom it doesn't intend to influence changed behaviours).

Workshop Exercise

This session will produce a list of boundary partners (people, organizations and groups) that the program is trying to influence and effect change upon.

Timing

1 hour.

Further References

Facilitation Manual: Step 3, pp. 41-46.



Stage 1: Intentional Design

Step 4: Outcome Challenges

Definitions

Outcome Challenges describe:

- The changed behaviours (relationships, activities, and/or actions) of a boundary partner.
- How they would be behaving if they were contributing ideally to the vision.

Facilitation Questions

- Ideally, in order to contribute to the vision, how would the boundary partner be behaving?
- Imagine that in 3 – 5 years the program has been extremely successful. What would your boundary partner be doing to contribute maximally to the vision?

Facilitation Tips

Outcome Challenge Statements:

- T Describe behavioural changes
- T Cover a single boundary partner
- T Set out the ideal scenario
- T Are linked to the vision

Rather than composing each outcome challenge in plenary, the participants can be divided into smaller groups to write the outcome challenge statements and then come together to review and revise them. If there are enough participants, two groups can write the same outcome challenge statement and they can then be compared in plenary.

- Outcome challenges statements describe the ideal change(s) in the behaviour, relationships, activities and/or actions of a boundary partner.
- Outcome Challenges are about the boundary partner, not the program.

Workshop Exercise

During this session, the group should develop one Outcome Challenge Statement for each Boundary Partner using this phrasing: The program intends to see [boundary partner] who [description of behaviours in the active present tense].

Use **Design Sheet 1: Program Framework** to record the results of Steps 1 through 4.

Timing

30 minutes per boundary partner.

Further References

Facilitation Manual: Step 4, pp. 47-52.



Stage 1: Intentional Design

Step 5: Progress Markers

Definitions

Progress Markers are:

- A graduated set of statements (usually 15 in total) describing a progression of changed behaviours in a boundary partner.
- Changes in actions, activities & relationships leading up to the ideal outcome challenge statement.

The program sets out what it would:

- Expect to see its boundary partners doing?
- Like to see its boundary partners doing?
- Love to see its boundary partners doing?

Facilitation Questions

- How can the program know the boundary partner is moving toward the outcome? What would they be doing?
- What milestones would be reached as the boundary partner moves toward the intended role in contributing to the vision?

Facilitation Tips

Each progress marker:

- T Describes a changed behaviour by the boundary partner.
- T Can be monitored & observed.

As a set, Progress Markers:

- T Are graduated from easier to more difficult to achieve changes in behaviour.
- T Describe the change process of a single boundary partner.

- The facilitator should be prepared to ask the participants to rethink their answers in terms of behavioural change and this may take several rounds of discussion to properly formulate a progress maker.
- If a program has multiple boundary partners but the primary result to be achieved is changing their relationship with one another then it is possible to create a single outcome challenge and set of progress markers for the whole group.

Workshop Exercise

Develop, for each outcome challenge no more than: 4 “expect to see” progress markers;

- 8 “like to see” progress markers; and 3 “love to see” progress markers.

Use Design Worksheet 2: Progress Markers to record the results (one sheet per Boundary Partner)

Timing

45 minutes per Boundary Partner/ Outcome Challenge

Further References

Facilitation Manual: Step 5, pp. 53-60



Stage 1: Intentional Design

Step 6: Strategy Map

Definitions

A Strategy Map:

- Outlines the program's approach in working with the boundary partner
- Indicates the relative influence the program is likely to have on a boundary partner
- Helps pinpoint strategic gaps in the approach or if the program is overextended
- Suggests the type of evaluation method appropriate to track and assess the performance of the program
- Is a six cell matrix for breaking down strategies based on whether they are causal, persuasive or supportive and whether they are aimed at the boundary partner or the environment in which the boundary partner operates.

Facilitation Questions

How will the program contribute to the achievement of the outcome challenge over the next X months/years?

Facilitation Tips

- If the program is composed of a number of different partners employing strategies to promote the same outcome, the facilitator can use different colour printing to represent the different partners' strategies on a single map. For example, a coordinating committee's strategies could be listed in red, a research team's strategies could be listed in blue, and a peasant organization's strategies could be listed in green.
- The strategy maps are nested in the sense that to put in place one strategy may require a number of different strategies. This is particularly true of the I3 and E3 strategies. For example, a program attempting to encourage tobacco control advocates to get involved in national health policy development might identify an E3 strategy of developing a network of policy makers, tobacco activists and health researchers program and evaluators. In order to do this, however, the program would have to offer training to the participants (I2) facilitate an electronic listserv (E2), provide a location for that group to meet (E1), etc.

Workshop Exercise

This session will yield one Strategy Map for each Outcome Challenge and set of Progress Markers (for each Boundary Partner). Use **Design Worksheet 3: Strategy Map** to record the results for each.

Timing

1 hour per Outcome Challenge.

Further References

Facilitation Manual: Step 6, pp. 61-68



Stage 1: Intentional Design

Step 7: Organizational Practices

Definitions

Organizational Practices are the things that you do as an organization to:

- Foster creativity & innovation.
- Seek the best ways to assist your partners.
- Maintain your niche.

This supports the notion that a program must change along with its boundary partners.

Organizational Practices include:

1. Prospecting for new ideas, opportunities and resources;
2. Seeking feedback from key informants;
3. Obtaining support of your next highest power;
4. Assessing and (re)designing products, services, systems and procedures;
5. Checking up on those already served to add value;
6. Organizational reflection and sharing your best wisdom with the world;
7. Experimenting to remain innovative;
8. Engaging in organizational reflection.

Facilitation Questions

- What do you have to be doing in order to remain effective?
- How will the program/ team operate in order to sustain itself and fulfill its mission?

Facilitation Tips

- Have the group think of the program as an organization in its own right.
- The program identifies organizational practices for itself, but not for its Boundary Partners.

Workshop Exercise

During this session, the group will develop a list of organizational practices the program should be doing in order to support the change process in its Boundary Partners. **Use Design Sheet 4: Organizational Practices to record the results.**

Timing

Approximately 3 hours.

Further References

Facilitation Manual: Step 7, pp. 69-74.



Stage 2: Outcome and Performance Monitoring

Step 8: Monitoring Priorities

Definitions

Monitoring Priorities identify whether the program wants to monitor:

- Changes in the Boundary Partners (Outcome Journal, Step 9);
- The effectiveness of its own strategies (Strategy Journal, Step 10);
- Its functioning as an organization (Performance Journal, Step 11).

Outcome Mapping Monitoring involves:

- Systematic collection of data;
- A process for regular learning & improvement cycle;
- Encouraging the program to challenge itself;
- Collecting & organizing, but not analyzing, data.

To do this effectively, the group must decide what can be monitored and establish priorities according to who will use the information and for what purpose.

Facilitation Questions

Base priorities on the intended use of monitoring data. Do you want it to:

- Improve performance through learning?
- Help meet reporting requirements?
- Supply information for a planned evaluation?
- Inform publicity documents, communication activities, or case-study materials?
- Support the learning needs of the boundary partner?

Prioritize your information needs according to:

- The degree of risk posed by the strategy, approach or partnership;
- The degree to which the strategy, approach or partnership is central to the success of the program;
- The degree of innovation associated with a strategy, approach or partnership; or
- If the strategy, approach or partnership is a major concern of a partner or donor.

Facilitation Tips

When setting monitoring priorities, it is always important to be realistic about what can be managed given the available human and financial resources. The facilitator confirms with the group that the priorities are realistic by asking, "Who will be responsible for collecting the data? How often will it be collected?"

Workshop Exercise

This session will help participants set realistic monitoring priorities, using **Monitoring Worksheet 1: Monitoring Plan**. The Monitoring Plan will suggest a monitoring journal appropriate to the type of information the program wants to collect.

Timing

Approximately 1 hour.

Further References

Facilitation Manual: Step 8, pp. 83-86.



Stage 2: Outcome and Performance Monitoring

Step 9: Outcome Journal

Definitions

The **Outcome Journal**:

- Charts boundary partner progress using progress markers
- Sets starting point or benchmark
- Captures details on changes in the boundary partner, contributing factors & actors, sources of evidence

Facilitation Questions

- How will the group determine values for high, medium and low rating so that they can be consistently measured over the course of the program. Will the group count the number of partners exhibiting the change and/or the quality/ depth of change exhibited by the boundary partner.
- What method is most appropriate to gather data?
- If the program was doing really well and had gathered all this information [read the Outcome Journal], would that be illustrative of its work?

Facilitation Tips

Refer to Step 9 in the Facilitation Manual for instructions on facilitating this Step.

Workshop Exercise

To track progress, an **Outcome Journal** is established for each Boundary Partner using **Monitoring Worksheet 2: Outcome Journal** and **Monitoring Worksheet 3: Program Response**. The journals are not filled out during this exercise. Instead the monitoring process the program will follow is developed.

Timing

Approximately 30 minutes per Boundary Partner.

Further References

Facilitation Manual: Step 9, pp. 87-96.



Stage 2: Outcome and Performance Monitoring

Step 10: Strategy Journal

Definitions

The **Strategy Journal**:

- Captures data on the strategies being employed to encourage change in the boundary partner;
- Helps the program gauge its contributions to the achievement of outcomes and modify its actions accordingly;
- Feeds into work planning.

Facilitation Questions

- What do you need to be able to document on a regular basis?
- What would you like to be able to document on a regular basis?
- What would you like to be able to simply discuss as a group on a regular basis but do not necessarily need to document?
- What method is most appropriate to gather the data?

Facilitation Tips

- Even though there is no information to put in the **Strategy Journal** during the design workshop, the facilitator helps the group customize it as required and devise a monitoring process.
- Some programs may prefer to simply use the **Strategy Journal** as a guide for conversation, while others may want to gather detailed information and evidence.

Workshop Exercise

The facilitator will lead the process of customizing the **Strategy Journal** and developing the monitoring process. Refer to **Monitoring Worksheet 3: Program Response** and **Monitoring Worksheet 4: Strategy Journal** to gain commitment from individual participants on monitoring.

Timing

Approximately 1 hour.

Further References

Facilitation Manual: Step 10, pp. 97-102



Stage 2: Outcome and Performance Monitoring

Step 11: Performance Journal

Definitions

The **Performance Journal**:

- Records data on how the program is operating as an organization to fulfill its mission;
- Includes information on the program's practices;
- Feeds into work planning.

Facilitation Questions

- What do you need to be able to document on a regular basis?
- What would you like to be able to document on a regular basis?
- What would you like to be able to simply discuss as a group on a regular basis but do not necessarily need to document?
- Will the group qualitatively describe its best examples (positive or negative) over the monitoring period and/or will it use quantitative indicators to count the number of times it exhibited the key actions for each practice?
- What method is most appropriate to gather the data?

Facilitation Tips

- Even though there is no information to put in the **Performance Journal** during the design workshop, the facilitator helps the group customize it as required and devise a monitoring process.
- Some programs may prefer to simply use the **Performance Journal** as a guide for conversation, while others may want to gather detailed information and evidence.
- Keep in mind that the Performance Journal captures on the **Organizational Practices** by the Program in support of its Vision and Mission.

Workshop Exercise

The facilitator will lead the process of customizing the Performance Journal and developing the monitoring process. Refer to **Monitoring Worksheet 6: Performance Journal** and **Monitoring Worksheet 3: Program Response** for this session, ensuring that how information will be collected and by whom is clear.

Timing

Approximately 1 hour.

Further References

Facilitation Manual: Step 11, pp. 103-109



Stage 3: Evaluation Planning

Step 12: Evaluation Plan

Definitions

The **Evaluation Plan** is:

- A short description of the main planning elements of an evaluation study;
- For whom? What? Where? How? By Whom? When? How much?

Facilitation Questions

- What do managers/ funders want/ need to know about the program?
- What do we need to report on?
- What information could make a difference to what you do?
- What areas or issues does the program need to know more about in order to improve?
- What are your knowledge gaps?
- What are your partners' knowledge gaps?
- Is there an issue that you have been monitoring that should be studied in greater depth?
- What can be done to help the program's partners fulfill their learning and accountability requirements?

Facilitation Tips

- The evaluation plan provides a short description of the main elements of the evaluation to be conducted by the program. It outlines the evaluation issue, the way findings will be used, the questions, the information sources, the evaluation methods, the evaluation team, the dates for the evaluation, and the approximate cost.
- Even if an evaluation is primarily required to meet an accountability requirement to an external donor or manager, it can be used to generate new knowledge, support learning, question assumptions, plan and motivate future activities, or build the analytical capacity of those involved.

Workshop Exercise

This session is intended to allow participants to elaborate on evaluation and information needs of the primary user of the evaluation in the form of a plan. Use **Evaluation Worksheet 1** to capture the results. The participants can complete the Evaluation Plan at any point when they are planning to conduct an evaluation.

Timing

Approximately 3 hours.

Further References

Facilitation Manual: Step 12, pp 115-124.

Outcome Mapping Training

May 13 – 16, 2007 – Cairo, Egypt

sample facilitator agenda

Day 1: Sunday, May 13

time	activity	facilitator	materials	comments
8.30	Registration		Binders, name tags	
9.00	Welcome Introductions facilitators & participants Workshop objectives & expectations Agenda overview Ground rules and process Binder content Personal monitoring journals		Dynamic Powerpoint Binders Journals	<i>Still confirming with Eglal</i>
10.00	Activity 1: Reflections and perceptions of M&E		<i>See new activity from Capacity Building book</i>	
10.30	Tea / coffee break			
10.50	An OM story		PP	<i>This is the Ceja Andina story</i>
11.05	OM overview <ul style="list-style-type: none"> The OM story Buzz group The core of OM How OM is different 		PP	
11:50	Activity 2: what are you here to do with OM?		activity	
12.05	The beginning of the Intentional Design <ul style="list-style-type: none"> Vision Mission 		PP	
12.30	Lunch			
2.00	Group / case study selection			<i>Need to consider best way to do this</i>

2.20	Activity 3: group work for vision and mission		Flipchart, markers	
3.00	Tea / coffee break			
3.20	Plenary			
4.00	Boundary Partners explanation		PP	
4.20	Activity 4: group work for identifying boundary partners		Flipchart, markers	
5.15	Review of the day <ul style="list-style-type: none"> • Individual monitoring journals • Group evaluation • Homework assignment 			<i>Need to decide on an evaluation for day 1</i>
5.30	Close			

Spectrogram Ideas!

- “Evaluation is best done by someone external”
- “No project is gender neutral”
- “The best project is a participatory project”
- “Quantitative data is stronger than qualitative data”
- “If you can’t attribute a change to your intervention, then it can’t be evaluated”
-
-
-
-
-
- Ask participants for spectrogram ideas!

Day 2: Monday, May 14

time	activity	facilitator	materials	comments
9.00	Feedback on day 1, agenda for day 2, announcements		PP	
9.15	Boundary Partner presentation (re-cap) and questions			
9.50	Outcome Challenges presentation and discussion		PP	
10.15	Activity 5: The OM Framework		Wallchart	
10.30	Tea / coffee break			
10.50	Activity 6: Group work Outcome Challenges		Flipchart, markers	
11.10	Plenary and questions			
11.20	Progress Markers presentation and discussion		PP	
12.05	Activity 7: Arranging Progress Markers		PMs	
12.30	Lunch			
2.00	Activity 8: Group work Progress Markers		Flipchart, markers	
2.30	Plenary and discussion			
2.45	Strategy Map presentation and example in large group		PP and wallchart	
3.30	Tea / coffee break			
3.50	Open discussion			<i>This is just a possible cushion</i>
5.00	Review of the day <ul style="list-style-type: none"> Individual monitoring journals Group evaluation Homework assignment 			<i>Decide what group evaluation to do ahead of time</i>
5.15	Close			

Day 3: Tuesday, May 15

Time	Activity	facilitator	materials	comments
9.00	Feedback on day 2, agenda for day 3, announcements, presentation OM Learning Community		PP	<i>The PP on OMLC will be quite brief</i>
9.20	Organizational Practices presentation and discussion		PP	
9.45	Activity 9: Organizational Practices group activity		Flipchart, markers	<i>Each groups tells us one OP after discussing</i>
10.10	Activity 10: OM Art		Flipchart, markers	
10.30	Tea / coffee break			<i>Walk around to look at art</i>
10.50	Recapping OM and M&E		PP	<i>The first 2 M&E slides</i>
11.00	Activity 11: Evaluation questionnaire		Handouts	<i>Paradigms exposed!</i>
11.25	M&E overview		PP	
11.45	Buzz group			
12.00	M&E planning presentation and discussion		PP	
12.30	Lunch			
2.00	Outcome Blues song		CD, speakers	
2.10	Discussion on M&E planning			
2.30	Activity 12: Spectrogram			
2.45	Implementation – collecting and analysing data		PP	
3.00	Tea / coffee break			
3.20	Journals		PP	
3.40	Buzz group			
3.50	Activity 13: importing methodologies and tools		Flipchart, markers	
5.00	Review of the day <ul style="list-style-type: none"> Individual monitoring journals 			<i>Need to decide on group evaluation activity</i>

	<ul style="list-style-type: none"> Group evaluation Homework assignment 			
5.30	Close			
7.30	Group dinner			Arrange for transportation

Day 4: Wednesday, May 16

time	activity	facilitator	materials	comments
9.00	Feedback on day 3, agenda for day 4, announcements			
9.15	Analyzing data; use of data			
9:45	Activity 14: Design data collection instruments		Handout	Need time for presentations as well Coffee during this time!
11:15	Outcome mapping recap		Diagram	
11.30	Introducing OM into your institution / context			
11.45	Activity 15: OM is useful when...			
12.00	Issues and concerns Revisiting expectations			
12.20	Closing <ul style="list-style-type: none"> Final personal monitoring journal Final evaluation Certificates 			
1.00	Lunch			
2.30 – 5.00	Personal / group consultations with the facilitators			

**Outcome Mapping:
Practical, Flexible, Participatory Approach to
Monitoring and Evaluation**

a 4-day workshop with an optional day of consultation

November 14-18, 2005
Ottawa, Canada

An integrated system of planning, monitoring and evaluation, Outcome Mapping

- Measures social change in development projects or corporate and institutional initiatives
- Brings the stakeholders into the M&E process
- Fosters social as well as organisational learning
- Strengthens partnerships and alliances
- Helps create an open organisational culture
- Provides tools and vocabulary for understanding the complexity of social change

First introduced by the Canadian-based International Development Research Centre (IDRC) in 2000, Outcome Mapping (OM) has been used in projects, programs and organisations in Latin America, Africa and Asia. A growing body of donor agencies, NGOs and monitoring and evaluation professionals are adopting Outcome Mapping because it helps them address issues that other, more traditional methods, such as Results Based Management and Logical Framework Analysis, do not consider. These questions include:

- How do we move beyond attribution to consider contribution to social change?
- How can we capture the richness of what is occurring in our projects without relying only on anecdotal evidence?
- How do we get our partners, colleagues and stakeholders more involved in the project?
- How do we integrate M&E into the project from the planning stage?
- How do we decide what to monitor and evaluate?
- How do we notice, explain and respond to unexpected results?
- How do we deepen our understanding of the change processes we are promoting

At the end of the four-day training, participants will be able to

- Understand and convey the pros and cons of using OM
- Begin to apply OM in their institutions and projects

- Create an M&E plan tailored to the specific needs of the project
- Combine OM with existing M&E methods
- Effectively use facilitation techniques in M&E contexts
- Join the international community of OM users

For more information about IDRC and OM, visit <<http://www.idrc.ca/evaluation>>.

A flexible, useful tool that can be applied in all phases of project design and implementation. Outcome Mapping can help

Project managers and staff

- Construct a common vision of what they hope to accomplish
- Make M&E an integral part of the project
- Obtain useful feedback on the work in progress
- Make better strategic use of funds
- Prepare reports to funders with greater ease and clarity
- Use M&E to reflect and learn from the process

Institutional partners and community members

- Have a voice in the planning and M&E process
- Understand their role
- Collaborate more effectively
- Increase their ownership of the initiatives

Funders

- Understand what is happening in a project
- Receive qualitative as well as quantitative information
- Learn along with the organisations they fund

This workshop is designed to help participants learn

- What OM is and how to use it
- Ways in which OM can be combined with other M&E methods
- When OM should not be used
- New ideas for designing M&E processes
- Facilitation skills for participatory processes

What this workshop is NOT about

- a “one size fits all” methodology
- a prescriptive solution

- an “all or nothing at all” approach

The workshop IS intended to give M&E and organizational development professionals, funders and others a useful tool to help plan, execute and render accounts in projects that involve social and institutional change.

The course methodology will embody the participatory values that are at the core of OM, combining theory with group discussion, individual reflection, small group practice and case studies. Course materials include a training manual, CD-ROM containing OM information in three languages (English, French and Spanish), a pdf version of the book *Outcome Mapping: Building Learning and Reflection in to Development Programs* by S. Earl, F. Carden and T. Smutylo, *Facilitator's Guide to Participatory Processes* by Beatrice Briggs, background articles and class worksheets.

The workshop will be conducted in English.

Consultations. On Friday, November 18, the three trainers will be available for individual consultations related to the application of Outcome Mapping and/or challenges related to facilitating participatory processes. Participants in the 4-day training will be invited to make appointments – or just drop in. These “extra help” sessions are intended to supplement the work done on individual cases during the workshop. There is no additional charge for this service.

Trainers

Kaia Ambrose has spent the last seven years in Latin America coordinating and directing a wide range of natural resource management projects and research initiatives. She has given special attention to the development and improvement of Outcome Mapping through hands-on application, and has facilitated training courses on the methodology. She holds a BA in Comparative Development Studies from Trent University (Peterborough, Canada) and a Master's degree in Community-Based Natural Resource Management from the Catholic University of Ecuador.

Beatrice Briggs is the director of the International Association for Facilitation and Consensus in Cuernavaca, Mexico. A native of the United States, she is internationally recognized for her skill as a facilitator and trainer. She is the author of the manual *Introduction to Consensus* and numerous articles about participatory processes. A member of the board of directors of the International Association for Public Participation, Beatrice is coordinating the IAP2's Latin American Initiative. She holds a B.A from McGill University (Montreal, Canada) and an MA from the University of Chicago. For more information about Beatrice and her work, visit www.iifac.org.

Terry Smutylo

Terry Smutylo was the founding Director of the International Development Research Centre's (IDRC) Evaluation Unit from its creation in 1992 until 2005. He led the teams that developed several internationally recognized methods for planning, monitoring and evaluating development initiatives. These include tools for: Organizational Self-Assessment; Peace and Conflict Impact Assessment (PCIA); and Outcome Mapping. Since leaving IDRC, he has worked as a Special Advisor to IDRC, as a faculty member of Carleton University's International Program for Development Evaluation Training (IPDET) and as an independent evaluation consultant. He works in Canada, United States, Europe, Asia, Africa and Latin America, with civil, governmental, national and international organizations, conducting evaluations, providing training and facilitating organizational development. He holds a Master's degree in African studies from the University of Ghana and an undergraduate degree in sociology from the University of Toronto.

Location. The workshop and consultations will be held at the International Development Research Centre headquarters, 14th floor auditorium, 250 Albert Street, Ottawa, Canada.

Schedule

The workshop sessions will run from 9 am – 5 pm, Monday-Thursday. Consultations will be held during the same hours on Friday, either by appointment or on a drop-in basis. A detailed program will be provided in advance.

Cost

\$1,200 CAD Includes tuition, course materials, lunch on Monday-Thursday, and coffee/tea breaks. Information about accommodations in Ottawa available upon request.

Space limited to 25 participants.

For more information contact:

Registration. See attached form or Visit

Outcome Mapping

November 14-18, 2005, Ottawa, Canada



sample: registration form

Name:

Organisation:

Street:

Town:

Postal code:

Country:

Telephone:

Fax:

E-mail:

Fees

Cost \$1,200 CAD

Includes tuition, course materials, lunch on Monday-Thursday, coffee & tea.

Deposit

To hold your place we require a minimum deposit of \$100 CAD per person. See payment details below.

Early payment discount

Participants who pay in full by September 14, 2005 receive a 10% discount.

Cancellation policy

Cancellations received at least two weeks before the start date of the course receive a 90% refund less than two weeks in advance, 50%. Those who fail to cancel but do not appear at the course receive no refund.

Payment

Payment in full is due on or before the start date of the course.

We offer the following payment options:

1. Cheque or money order in Canadian dollars payable to (Name) and sent to:

ADDRESS

PHONE

EMAIL

2. On line registration and payment with credit card will be available in August. If you are interested in this option, let us know.

Send the completed registration form

By e-mail to:

By mail to:

By fax to:

Or complete it on line

For more information contact:

Kaia Ambrose

Name:

Date:

My Overall Learning Goal For This Workshop:

My Specific Learning Goals	Daily Progress Rating 0 = no learning 1 = some learning 2 = advancing 3= Breakthrough!				
Goal 1	day 1	0	1	2	3
	day 2	0	1	2	3
	day 3	0	1	2	3
	day 4	0	1	2	3
Goal 2	day 1	0	1	2	3
	day 2	0	1	2	3
	day 3	0	1	2	3
	day 4	0	1	2	3
Goal 3	day 1	0	1	2	3
	day 2	0	1	2	3
	day 3	0	1	2	3
	day 4	0	1	2	3
Goal 4	day 1	0	1	2	3
	day 2	0	1	2	3
	day 3	0	1	2	3
	day 4	0	1	2	3
Goal 5	day 1	0	1	2	3
	day 2	0	1	2	3
	day 3	0	1	2	3
	day 4	0	1	2	3

example: personal learning monitoring worksheet

DAY 1

Goal	Description of learning
1	
2	
3	
4	
5	
unexpected learning:	
Contributing factors, actors, events:	
Difficulties:	
Implications/Importance for me & for my organization:	

DAY 2

Goal	Description of learning
1	
2	
3	
4	
5	
unexpected learning:	
Contributing factors, actors, events:	
Difficulties:	
Implications/Importance for me & for my organization:	

Day 3

Goal	Description of learning
1	
2	
3	
4	
5	
unexpected learning:	
Contributing factors, actors, events:	
Difficulties:	
Implications/Importance for me & for my organization:	

Day 4

Goal	Description of learning
1	
2	
3	
4	
5	
unexpected learning:	
Contributing factors, actors, events:	
Difficulties:	
Implications/Importance for me & for my organization:	

There are many energizers and other tools that can serve as daily evaluations, depending on the size and type of group; these are some of the ones that have worked for OM workshops in the past:

Critical Friend

- Materials: none
- Instructions: ask for one to four volunteers at the beginning of the day and explain that they will report back to the facilitators in a private session at the end of the day to offer their observations and messages from other participants on how the workshop is unfolding, what is working well, where there are gaps in understanding, etc. Let the rest of the participants know that they can approach these “critical friends” throughout the day to give them messages to relay to the facilitators at the end of the day.

Eyes and Ears

- Materials: if you wish, a small drawing of an eye and on a separate piece of paper, a drawing of an ear.
- Instructions: ask for two or four volunteers (one or two eyes, one or two ears). Explain that their job will be to observe and listen throughout the day to participant reactions, energy, level of understanding, comfort, anything they wish. At the end of the day they report back in front of the entire group. Other participants may add to the discussion as well if time permits.

What Worked Well?

- Materials: flipchart, makers
- Design:

What worked well today?	What could be improved?

- Instructions: ask participants, in the spirit of brainstorming, to call out their ideas and thoughts for either column. Record answers and discuss if necessary. After participants have left for the day, review chart with co-facilitators and agree on how to improve the issues brought up by participants. The following morning, go back to the chart and explain to participants how each item will be addressed.

Gradient of Comfort

- Materials: signs (see instructions)
- Instructions: ask participants to imagine a line across the floor; at one end of the room is a sign that says “completely comfortable” and at the other end there is a sign that says “not at all comfortable”. Ask participants to stand on the line in a spot which best represents their thoughts and feelings about the workshop so far. Have participants, on a voluntary basis, explain where they are on the line and why.

Happy Face, Sad Face

- Materials: flipchart paper, markers
- Design:

Questions	<i>Draw a happy face</i>	<i>Draw a neutral face</i>	<i>Draw a sad face</i>
<i>Your questions can be about process, content, specific aspects,, if they feel their expectations are being met, how satisfied they are thus far, etc. etc. Try and limit your questions to 5.</i>			

- Instructions: ask each participant to check under the appropriate face (according to their feelings) for each question; facilitators should leave the room.

Pie Chart

- Materials: flipchart paper, markers
- Design (modify sections / topics as necessary):



- Instructions: tell participants they have 5 votes with which to answer the question: “Which topics would you like the workshop to spend more time on tomorrow?” Once people have voted (by putting a check or dot in the appropriate section), ask “what aspect...?” for each topic. Allow discussion and reach agreement on what to note on a flipchart for adding to the next day’s agenda.

Suggestion Box

- Materials: box, small sheets of paper, markers or pens
- Instructions: participants may write at their will suggestions they would like to see on process, content, dynamic, logistics and put in suggestion box to be reviewed by facilitators once a day.

There are several ways to do a final evaluation; here are two samples that can be modified according to need.

Evaluation Option #1

Final evaluation of Outcome Mapping Training Workshop

Date Place

	Process	Content
Keep		
Add		
Change		

examples: final evaluations

Evaluation Option #2

Final evaluation of Outcome Mapping Training Workshop

Date *Place*

Who will use this evaluation?: the facilitators, IDRC's Evaluation Unit

What will it be used for?: to improve the methodology, process and content of OM training workshops in the future; to understand how different participants view Outcome Mapping and its usefulness

1. At what point (s) were you most engaged with what was happening in the workshop?
2. At what point(s) were you most bored or disengaged with what was happening in the workshop?
3. What action did someone take in this workshop that was most affirming and helpful?
4. What action did someone take in this workshop that was most puzzling or confusing?
5. What surprised you the most during this workshop?
6. What did you gain, if anything, from attending this workshop?
7. What steps will you take, if any, as a result of this experience?
8. Any other comments?

On a scale of 1 – 10, how would you rate the workshop's utility? Please circle one number:

1 2 3 4 5 6 7 8 9 10

Not useful

Somewhat useful

Extremely useful

THANK YOU FOR YOUR PARTICIPATION AND FEEDBACK!

Final Facilitation comments – OM Cape Town Workshop
Sarah Earl, Kaia Ambrose, Donna Podems
01/26/07

Topic	Keep	Add	Change	Eliminate
Ground rules				
Opening of w/s				
History of OM				
Introductory slides in general				
Sustainability slide (crossing lines showing relative influence or project and local actors)			Soften the linearity	
3 key concepts slides			Separate theory of change from the other two concepts (sphere of influence and outcomes understood as changes in behavior) Present OM as a model or template for defining the program's theory of change.	
Focus of w/s on project level		Way to show that OM can be applied at all levels (project, program, organization)		
Concept of iterative process			Clarify meaning - give example, improve graphic (spiral) to be more illustrative	
Strategic partners slide				
Vision				
Monitoring slides				
Monitoring exercises				
Evaluation section				

example: facilitator assessment

Final Facilitation comments – OM Cape Town Workshop
Sarah Earl, Kaia Ambrose, Donna Podems
01/26/07

Are you my boundary partner game				
Personal monitoring journal				
Using one case throughout w/s				
Case video				
Arranging PMs exercise				
Answer sheet for vision/mission exercise				
Pros/cons of OM discussions				
OM street theatre				
“Barter fair” exchange of OP ideas, experiences				
Icebreakers (first day: human map; second day: OM alcohol free cocktail party – at 9 am!),				