

LASER PULSE Outcome Monitoring Instruction Manual

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This document provides guidance and instruction to LASER PULSE personnel, and selected affiliates, on Outcome Mapping (OM) as applied by LASER PULSE, especially in terms of how to use the LASER PULSE Outcome Monitoring Journal (OMJ) to record information and data on LASER's Boundary Partners (BP) in relation to OM Progress Markers developed for each BP. Contents of this document include:

- *Section 1: Information about the LASER PULSE Outcome Mapping Framework*
- *Section 2: Details on Progress Markers, including their intent/purpose and how to utilize them*
- *Section 3: A brief overview of the LASER PULSE Outcome Monitoring Journal (Qualtrics surveys)*

New content may be added to this manual periodically in order to better assist those involved in the reporting process as it pertains to OM. If you still have any questions about reporting responsibilities or procedures after reading this document, please contact frossi2@nd.edu for help.

1. LASER PULSE Outcome Mapping Framework

Information pertaining to Outcome Mapping, and LASER's application of this system, is compiled in a Google Sheets folder ([link here](#)) with the following shared drive path: LASER Program Shared Folders / MEL / Outcome Mapping. You can find there the file [OM Documentation for LASER](#), which is our foundational OM plan -- key elements of which are described in the next section. The other two files shown are other lesser components of the OM system that are yet to be fully developed.

For those desiring a deeper understanding of OM and its application, the [Background Info](#) sub-folder contains pdf files such as Earl et al. (2001), which is the seminal document from IDRC that established (and describes) the OM process. Smutylo (2005) and Jones and Hearn (2009) are both brief (4-page) overviews of OM, while Roduner et al. (2008) is an article that provides a synthesis of OM and the traditional logframe method used for development project planning.

In addition to these key resources, all of the materials from the 4-day OM training session (July 2019 at Notre Dame) are compiled in the [Training](#) sub-folder; the main file there is Simon Hearn's slide deck. The [Progress Markers](#) sub-folder contains this document, the summary sheet for curating all of the responses from the OMJ, and files that contain the PMs for each BP.

Very Brief Overview of OM (2 paragraphs)

OM is a method for designing/planning a development program in which the delineation of monitoring, evaluation, and learning (MEL) processes is key. It emphasizes continuous learning and flexibility with an assumption, built into its core, that the most effective planning and MEL activities are iterative and reflexive. OM fosters learning about the various actors, contexts, and challenges involved in influencing social change by linking feedback mechanisms for adaptive management to projects so that implementers can track how the proposed activities, tied to each partner, lead to results towards the main 'vision' of the project.

The intentional design element of OM comprises the participatory establishment of an overall shared 'vision' for the selected projects to be integrated (i.e. delineating the broad changes that are desired). A

mission statement is then developed to define how the project implementers will work to support the attainment of the vision; they then generate *outcome challenge* statements to describe the tangible effects that are to be achieved by *boundary partners* – the projects, organizations, and/or individuals that are in a position to influence the beneficiaries of the projects. Graduated *progress markers* are then developed for each outcome challenge; these represent “indicators” through which the performance monitoring aspect of the program is anchored. Finally, a strategy map for each outcome challenge is generated to define the specific activities the projects will engage in to achieve a given outcome.

2. A Primer on Progress Markers

The following five paragraphs are excerpted from [Outcome Mapping: Building Learning and Reflection into Development Programs](#) (Earl et al. 2001, pp. 54-55) -- with some redactions and other slight modifications to streamline the key message about progress markers and their usage. Reading this will provide you with a good understanding of PMs and their function in terms of reporting.

“Graduated progress markers show the complexity of the change process associated with each boundary partner and represent the information that the program can gather in order to monitor achievements toward the desired outcome.* A set of progress markers represents a change model for the boundary partner that illuminates the depth and complexity of change being sought. The progress markers should advance in degree from the minimum one would *expect to see* the boundary partner doing as an early response to the program's basic activities, to what it would *like to see* them doing, to what it would *love to see* them doing if the program were having a profound influence.

“For instance, progress markers that indicate reactive participation by the boundary partner are relatively easy to achieve and are listed first, under ‘expect to see’; whereas those that indicate more active learning or engagement are listed second, under ‘like to see’; and those that are truly transformative are listed third, under ‘love to see.’ In this way, the program will be able to trace what has been accomplished, while being reminded of what still needs to be achieved. Progress markers are generally as follows: “*Who? Is doing what? How?*”

“Individually, progress markers can be considered as sample indicators of behavioural change, but their real strength rests in their utility as a set. Cumulatively, they illustrate the complexity and logic of the change process. This is something that no single indicator can accomplish.

“Progress markers are intended as a way for the program to understand and react to the change process in which the boundary partner is engaged. ... Although time lines are a reality in a development program, they are often externally imposed, may not be intrinsically relevant to the vision, and may even distract from the achievements most relevant to the vision. Reaching the ‘deadline,’ or the ‘target,’ therefore, should not be a primary focus of the program. The purpose of the program is to foster sustained change in boundary partners, and the purpose of the progress markers is to monitor the achievements that contribute to that outcome.

“Progress markers can also be used to describe how the boundary partner is interacting with its own boundary partners, thereby reflecting the indirect influence of the program. A program selects its boundary partners because of the influence it thinks they can have on development, and the progress markers permit this influence to be tracked.”

- * For a detailed study of progress, the program can conduct an in-depth evaluation, combining the data from the progress markers with information on their context (gathered using other evaluation tools and methods).

Note that a summary sheet (in pdf form) containing all Progress Markers, and their associated code numbers, will be provided to all respondents as an attachment to the e-mail announcement that will mark the beginning of the reporting process.

3. Information / Instructions for the LASER PULSE Outcome Monitoring Journal

A set of Qualtrics surveys is the format used for the Outcome Monitoring Journal (OMJ); the password for each survey is **Jamaica**. Click on the following LASER Boundary Partner (BP) to access a given survey: [NGOs](#), [Researchers](#), [Policymakers](#), [Donors](#). The intent of the OMJ is to collect information about LASER's BPs to record behavior changes with respect to the Progress Markers (PM) -- specific to each of the four BPs -- that we collectively identified at the OM training (and subsequent meetings) in 2019.

Survey Procedure

Each survey begins by collecting respondent name and affiliation, then displays the "Outcome Challenge" specific to the BP in question. It is beneficial to review this and keep it in mind when answering the questions. The survey then asks for respondents to select one or more of the PMs for which they have information to report. Only those PMs that you have information to report on should be selected from the check-list that is provided. The actual set of reporting questions used to elicit the desired information are identical across PMs and the survey will 'loop' through, iteratively, each PM selected. For example, if you are reporting on practitioners (NGOs), then you will select those PMs that you want to report on for practitioners, and then answer the same set of questions for each PM (one PM at a time, for however many PMs were chosen).

Note that, within the survey, links are provided to the lists of PMs for each BP (mentioned in Section 1 above) in order to assist the respondent with respect to knowing which PMs they need to report on, PM codes for internal reference, etc.

Specific Instructions

The following are the actual instructions provided in the reporting form:

1. Write your name, then select your organization.
2. Read the "Outcome Challenge", then select all of the Progress Markers for which you have information to report on, then answer a brief set of questions for each of the Progress Markers selected.
3. If you have pertinent information to relate that an existing Progress Marker does not capture, then use the "Other" option at the bottom of the Progress Marker list.
4. If information you are reporting is repetitive for one or more Progress Markers: after recording the initial instance, insert "same as PM #" in the relevant text boxes, where "#" refers to the specific Progress Marker code you are referencing.