

Monitoring of Advocacy – When the change process is complex

Paper reflecting on an explorative process in *Fagligt Fokus* 2014

Simple, complicated, complex

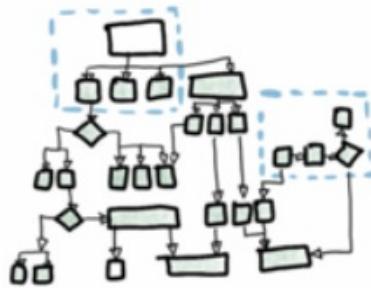
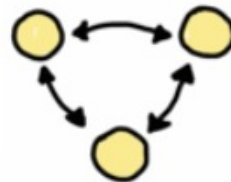
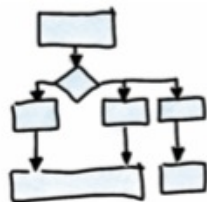


Illustration by Silva Ferretti

Content:

1. Introduction.....	3
2. Background.....	3
3. Purpose.....	4
4. Process.....	4
5. Exploring the concept of complexity	5
6. Reflection and learning - workshops	7
6.1 Relationships	7
6.2 Organisational adaptive capacity	10
6.3 Learning and accountability	11
7. Professional panel – reflections and learning.....	15
8. Issues to consider and way forward	16
9. Concluding remark – Doing Development Differently?.....	18
Annex 1: Suggested reading:	19
Annex 2: Consultants and facilitator introductions:.....	20
Annex 3: Professional Panel participants:	21

“Stop trying to change reality by attempting to eliminate complexity”

David Whyte, Irish poet

1. Introduction

This paper originates from an explorative process undertaken by Fagligt Fokus¹ in 2014, which has focused on how to monitor advocacy when the change process is complex. The explorative process has consisted of 3 workshops with external input and in between the workshops meetings have been undertaken in a professional panel comprising members representing a cross section of Danish Civil Society Organisations (CSOs).

The paper reflects on the purpose, the concept of complexity plus reflection and learning generated in the process. The paper presents in “process-boxes” elements of “what we did” in the process, which hopefully will be of inspiration to others. The paper is concluded by a section, which reflects on how complexity may be taken into consideration in the context of advocacy and possibly international development aid in the time to come.

2. Background

Many CSOs are struggling with measuring advocacy, and many of the same challenges are raised over and over again: documenting attribution and contribution, setting indicators, logic of plans and campaigns, collecting evidence, reporting on outcomes, organisational learning, multi-country M&E systems, donor expectations, and accessing political intelligence - just to mention some of the identified challenges².

Monitoring approaches to advocacy have often not been in support of the advocacy results. This is in particular the case when stakeholders are not involved, as the process will risk disempowering the very groups on whose behalf advocacy was carried out. At the same time donor expectations in regard to CSOs being able to document advocacy results are increasing, which in a Danish context is emphasised by the RAM procedures (resource allocation for framework organisations):

Advocacy efforts should be monitored for quality, accountability, results and learning, and should be useful for guiding efforts of capacity development. Monitoring advocacy is often based on self-assessment and monitoring processes, rather than focusing exclusively on the end results.
Policy for Danish Support to Civil Society (June, 2014)

However, advocacy work often takes place in contexts of complexity characterized by a continuously evolving environment, which explains why there has been limited success in approaching monitoring advocacy by use of fixed plans, predetermined

¹ Fagligt Fokus <http://www.fagligtfokus.ngoforum.dk> is an initiative under Global Focus, the coordinating body of Danish NGOs. The purpose of Fagligt Fokus is to enhance the professional learning and development of methodology among the Danish NGOs involved in development cooperation. Fagligt Fokus is administered by CISU.

² Issues are raised in a recent INTRAC paper: Challenges and solutions in monitoring and evaluating advocacy”, by Sarah Rose, Feb. 2014, in the Fagligt Fokus paper “Challenges and Dilemmas in Monitoring Advocacy”, by Annemette Danielsen and Dorte Skovgaard, Feb. 2014, and by the participants in the Fagligt Fokus seminar 13th March 2014.

outcomes and indicators and a linear chain of cause-and-effect. Monitoring advocacy is consequently by some described as “**more of an art than a science**”³.

3. Purpose

These challenges call for probing into possible new approaches to monitoring of advocacy – instead of doing “more of the same”. On this basis *Fagligt Fokus* has in 2014 been facilitating a process, which aimed at exploring **how and to what extent it is possible to combine a results-based approach to monitoring of advocacy (e.g. RAM) with an approach, which includes the complexity of advocacy change processes.**

By a **complexity aware approach** we understand an approach, which takes into account complexity in relation to monitoring due to a growing recognition that many **advocacy interventions** are promoting change processes that are not easily managed by conventional monitoring approaches and tools, which follow a logic of linearity, predictability, and control.

The process in *Fagligt Fokus* aspired to: develop our approaches to monitoring of advocacy processes, by jointly engaging in exploring a complexity aware approach to monitoring advocacy.

4. Process

The target group for the phased process has been: NGO representatives from framework, program or small and middle-sized organisations working with programme development, quality assurance, and monitoring, learning and evaluation. Participation in the exploration process has been possible either in the form of workshop participation or as part of the Professional Panel.

We knew from the outset of the process that we would be testing new grounds.

Participants were invited to engage in a process where there have been no fixed solutions and where curiosity and an open attitude have driven the work.

The quality of the results from the process would depend on the active engagement of the participants and the interaction in the group, and between the participants and the facilitators. We therefore decided to invite 4-6 representatives from target group organisations to form a **Professional Panel**.

The Professional Panel met 4 times during the process to:

- Identify and probe into questions and issues to be addressed in the process.
- Contribute to the planning of the workshops and make own experiences available for further exploration in the process.
- Serve as professional sparring partners and 'critical readers' of the draft reflection note on complexity aware monitoring of advocacy.

Participants have been invited to take part in all **3 workshops** or in selected workshops. All workshops have combined external inputs, interaction in the form of

³ Refer to above mentioned paper by INTRAC

group processes, and self-reflection. Participants have been invited to do homework in the form of small exercises to be undertaken in their own organisations, and they have been encouraged to share experiences. The intention has been in essence to establish a space, which has been developmental and conducive to learning.

5. Exploring the concept of complexity

The process has taken point of departure in understanding a *complexity aware approach* as an approach, which takes into account complexity in relation to monitoring due to a growing recognition that many advocacy interventions are promoting change processes that are not easily managed by conventional monitoring approaches and tools.

Major institutional donors, such as USAID and DfID, reflect this growing recognition in e.g. discussion notes and papers published. USAID states that complexity-aware monitoring: ".... is appropriate for aspects of strategies or projects where cause and effect relationships are poorly understood, thereby making it difficult to identify solutions and draft detailed implementation plans in advance....." "On the other hand, projects that deliver services, or roll out, replicate or scale up tried and true programming strategies are not generally a good match for these monitoring approaches" (USAID, 2013). USAID suggests two questions, which can help identify complex aspects of a project or strategy:

What is the degree of certainty about how to solve the problem?

What is the degree of agreement among stakeholders about how to solve the problem?

The questions can be illustrated in the following way:

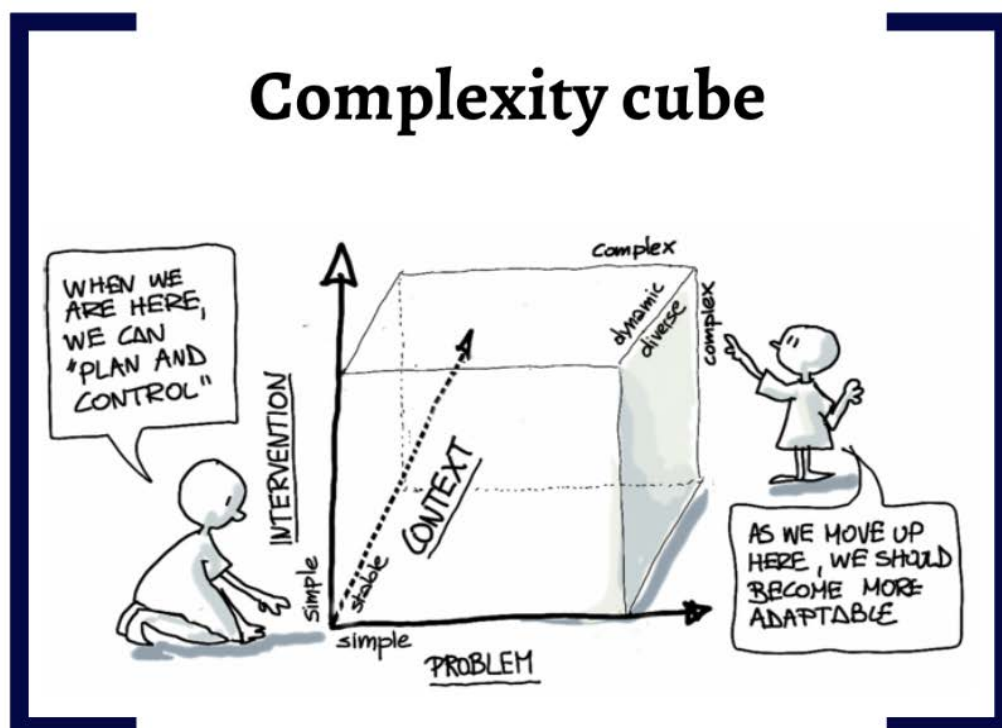


Illustration by Silva Ferretti

Complexity awareness is inspired by **systems thinking**, which understands a system as something that exists and functions as a whole through the interaction of its parts, and yet is greater than the simple sum of its parts. The identity and behaviour of the whole depends on how the parts relate to each other. Thus if you want to change the nature of the whole **you have to pay attention to (= monitor) the quality and nature of the relationships between the parts** – and ultimately aim to intervene in ways that change the relationships between the parts.

Advocacy work often happens in a continuously evolving environment where many actors interact, with different and sometimes conflicting priorities. Unexpected events can dramatically change the spaces and possibilities for action. It is seldom possible fully to predict what will happen in the future and consequently room for adaptation is needed. Rather than assuming that you are fully in control of what results your advocacy activities will bring – and only use conventional result-based monitoring – there is a need for strengthening the planning and monitoring approaches by paying attention to the complexity of the change process.

The *Fagligt Fokus* process has been seeking inspiration from a similar though more comprehensive process undertaken by PSO in Holland, where ten development organisations explored different Planning, Monitoring and Evaluation (PME) approaches with the aim of dealing more effectively with complex processes of social change. The process has been documented in the INTRAC Praxis Paper no 26: Dealing with complexity through Planning, Monitoring & Evaluation (PME).

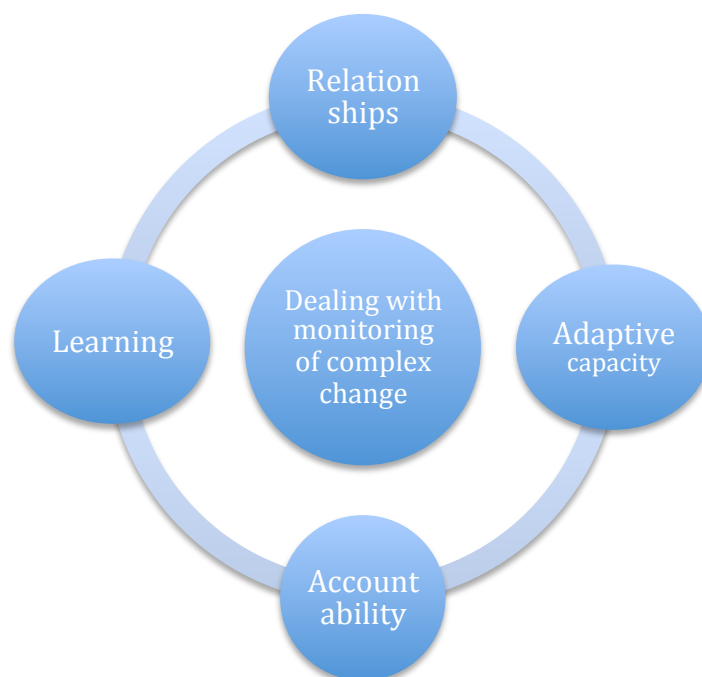


Diagram on complexity aware monitoring (adjusted from *Dealing with complexity through actor-focused Planning, Monitoring & Evaluation (PME)*, PSO November 2012).

Four elements or points for observation in a complex change process were identified by PSO, and *Fagligt Fokus* has been taking point of departure in these in the process of exploring how our advocacy monitoring practices can be adjusted and developed - illustrated by the diagram above.

The following questions have inspired the *Fagligt Fokus* **exploration process**:

Collective reflection questions:

1. How can a complexity aware approach to monitoring of advocacy contribute to clarifying **relationships**, roles and expectations of the actors involved in the intervention?
2. How can a complexity aware approach to monitoring of advocacy contribute to strengthening the internal **adaptive capacity** of the programme, partner organisations, partner networks, and/or Northern CSOs?
3. How can a complexity aware approach to monitoring of advocacy contribute to satisfying downward, horizontal and upward **accountability needs**?
4. How can a complexity aware approach to monitoring of advocacy contribute to **learning** about the progress towards the advocacy objectives (of the programme, partner organisations, partner networks, Northern CSOs)?

Process:

With the aim to unpack the concept of complexity aware monitoring the *Fagligt Fokus* Professional Panel has been reading a number of documents on the topic. Reading of documents was combined with writing a brief summary on the content of the document plus as follow up discussion in the Professional Panel where key observations and reflection were shared. See annex 1 for a list of the documents and suggested reading.

6. Reflection and learning - workshops

6.1 Relationships

Collective reflection question:

How can a complexity aware approach to monitoring of advocacy contribute to clarifying **relationships**, roles and expectations of the actors involved in the intervention?

<p>Workshop 1</p> <p>Date: 14. June 2014</p>	<p>What might a complexity aware approach to monitoring advocacy look like?</p> <p>Visual input aimed at exploring ideas for a complexity aware approach to monitoring, in particular with focus on dealing with multiple actors, perspectives and relationships.</p> <p>With Silva Ferretti, Italy</p>
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What did we do:

The Italian consultant, Silva Ferretti⁴, who has been working a lot with complexity aware approaches to planning and monitoring, took point of departure in stating that too often monitoring is treated as a reporting function and gets disconnected from the rest. It does not feed into other “project cycle stages” (e.g. planning, implementation, assessment) or into other specialized functions (e.g. advocacy, communication, policy). This approach to monitoring limits its potential to provide quality, on-time information and insights, which add value to the intervention. Rather monitoring needs to seamlessly connect to all other aspects of the intervention in order to be meaningful.



Illustration by Silva Ferretti

The relationships and interactions between the elements and actors in the intervention are key focus areas in a complexity aware approach to monitoring of advocacy. Collaboration, negotiation, dialogue, influencing, lobbying and conflict are just a few examples of such interactions. Different actors involved in the interaction often have different understandings and perspectives regarding the same issue. Problems or issues might be understood in different ways. Consequently change can mean different things to different people and results can be found at different levels. The various expectations, perspectives and roles of the different actors will need to be clarified.

A mapping of the different actors involved in the intervention is an important step in visualising and understanding the system you are working with. But it is important to note that as opposed to a traditional stakeholder mapping, what is needed is an explicit analysis of the interaction between different stakeholders rather than mapping them in isolation.

Process:

In preparing for the workshop, Silva Ferretti asked the participants in the Professional Panel to spend 5 minutes on filling in a simple Internet based questionnaire:

To what extent have you so far collaborated with other members of the panel on approaches to monitoring of advocacy?

Do you have strong linkages with any other organization on "approaches to monitoring of advocacy"?

The questionnaire contained 3 categories for answering: strong collaboration, moderate collaborate and little or no collaboration – plus a N/A category.

The aim was in a very simple way to show the nature of the relationships presently in the panel (Silva used software from <http://visone.info/>):

⁴ Contact email: silva.ferretti@gmail.com

Social network maps

Mapping the network

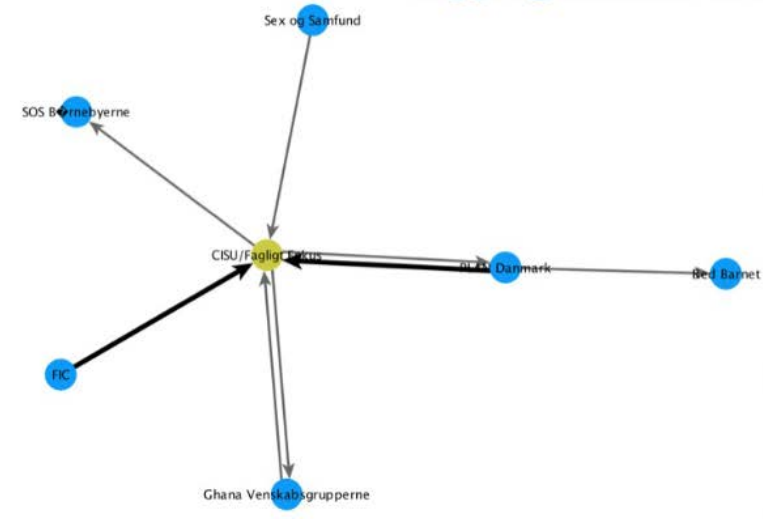


Illustration by Silva Ferretti

To demonstrate **how systems, collaboration and relationships can evolve** Silva Ferretti invited all the participants at the workshop to stand on the floor and pick two people – the instruction was then to keep the same distance to the two people as they/you move. Observations were: the relationship is not stable but dynamic, it requires awareness, and one needs to be alert and also proactive.

By use of the presentation software Prezi, which due to zooming and rotating is very dynamic presentation tool, **combined with her own drawings**, Silva's input at the workshop was very lively and could be seen as modelling a complexity/systems approach to being and functioning.

Learning points: Actors within complex systems continuously interrelate and adapt. The system itself, as a consequence, evolves and changes. New patterns, relationships, dynamics emerge. In a complexity aware approach “best practices” - to be used off the shelf - do not exist. Any practice will always require adaptation. But by paying attention to the relationships programme stakeholders are able to specify roles and responsibilities plus clarify the expectations of the various actors, which may open up new opportunities for meaningful interaction and dialogue. Trustful relationships increase the learning potential. If you want to involve many actors in generating, using and sharing information about change, then you need to have simple systems for monitoring, with emphasis on less data and more thinking and reflection.

6.2 Organisational adaptive capacity

Collective reflection question:

How can a complexity aware approach to monitoring of advocacy contribute to strengthening the internal **adaptive capacity** of the programme, partner organisations, partner networks, and/or Northern CSOs?

Workshop 2

Date: 28.
August 2014

RAM-standards: What are the implications for our organisational practice and adaptive capacity?

With point of departure in the DANIDA RAM-standards, the workshop focused on complexity aware monitoring, the notion of **organizational practice** and how to strengthen our **adaptive capacity** due to changing contexts and donor requirements.
With James Taylor, CDRA, South Africa

What did we do: The South-African development practitioner, James Taylor (www.cdra.org.za) has in his work focused on how organisations and development practitioners can develop a level of awareness, which enables us to relate in a developmental way – to oneself, to our own organisation and to our partners. Relationship is at the heart of development itself. *If society is to change in ways that fundamentally change the lot of those presently living on the margins, organisations are going to have to become places in which people think and act very differently* (quote: James Taylor). **Since supporting complex change is a two-way process, any organisation that is supporting social change processes, will also change.** Consequently, being aware of and able to adapt to the changing context is crucial for development practitioners, organisations or programmes to remain effective and relevant to those living on the edge of societies.

During the workshop James Taylor referred several times to Deming⁵, who was an American management consultant working for private enterprises. Deming saw what he called the excessive individualism as a major obstacle in many aspects of Western culture, including in management: “Management by results is confusing special causes with common causes”. If monitoring of advocacy is to cover not just special causes but common cause, our monitoring practice would have to track the structures, processes and exchanges linking the actors and factors within a system. Many participants questioned whether the RAM standards would enable us to do that, and whether learning actually can take place as part of the RAM framework.

James Taylor concluded the workshop with a quote by Deming: “Learning is not compulsory... neither is survival”

⁵ **William Edwards Deming** (October 14, 1900 – December 20, 1993) was an American engineer, statistician, professor, author, lecturer, and management consultant. Trained initially as an electrical engineer and later specializing in mathematical physics, He is best known for his work in Japan after WWII, particularly his work with the leaders of Japanese industry.

Process: In preparation of the workshop the participants were asked to do homework and bring 1-2 questions that reflect their own organization's process of internalizing and preparing for the RAM standards. The Professional Panel had submitted questions in writing.

The workshop started out with a session where the participants were asked to share their questions in plenary e.g.: how do we apply a developmental practice at organisational level as part of the RAM-reporting? How can we synchronise monitoring and RAM-reporting with the pace of change in the contexts we are working in? Relationships are key also in advocacy but we seldom monitor these explicitly - how can this be done? How is RAM experienced? By Danish CSOs? By our partners?

Learning points: Monitoring of advocacy with a focus on complexity can only enhance the organizational adaptive capacity if monitoring doesn't get disconnected from the rest of the organization. Complexity aware monitoring has the potential of enhancing the organizational adaptive capacity, especially if:

- the monitoring process is **open towards new information** and not just focused on measuring results from projects and programmes against pre-determined indicators and outputs (whereby information is automatically put into fixed categories)
- if the organization is prepared on a regular basis **to take time to step back and reflect** in an attempt to make meaning of the new knowledge.
- if the organization is prepared to challenge the existing ways of working and established categories of meaning - and act - and adapt - on the basis of the **new insights**.

It is important to observe what a monitoring framework, like RAM, does not just to the organization, but also to the Danish CSO sector itself.

6.3 Learning and accountability

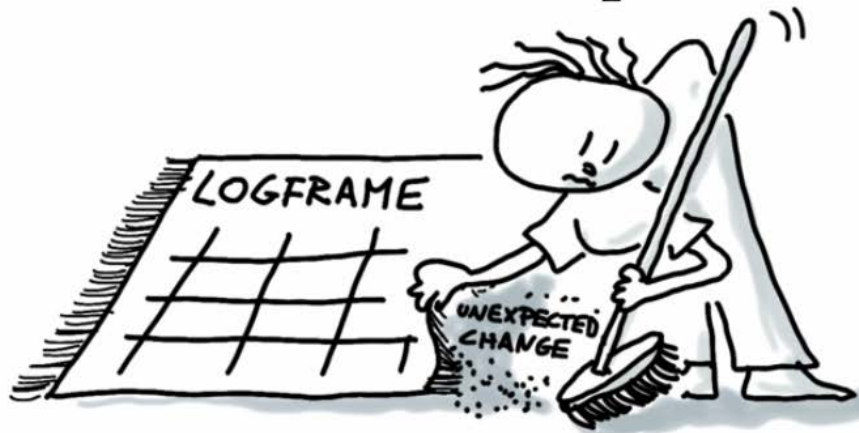
Collective reflection questions:

How can a complexity aware approach to monitoring of advocacy contribute to satisfying downward, horizontal and upward **accountability needs**?

How can a complexity aware approach to monitoring of advocacy contribute to **learning** about the progress towards the advocacy objectives (of the programme, partner organisations, partner networks, Northern CSOs)?

<p>Workshop 3</p> <p>Date: 24. November 2014</p>	<p>Feed-back and blind spots when dealing with learning and accountability</p> <p>The workshop will focus on how to deal with different accountability needs and how to foster adaptive learning and innovation.</p> <p>With Jenny Ross, INTRAC.</p>
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Under the carpet



"ignoring unintended results, alternative causes, and the multiple pathways of contribution is perilous for complicated and complex aspects of projects and contexts...
The recent meta-evaluation of 340 USAID evaluation reports found that only 15% reported on unplanned effects, and only 10% discussed causes in addition to USAID interventions that might be contributing to results"

Illustration by Silva Ferretti

What did we do: The British consultant, Jenny Ross, does training courses for INTRAC on influencing and supporting change in complex contexts. Jenny was throughout her presentation reflecting a systems approach to development and change:

- Change is context-specific and dynamic.
- Change cannot be delivered by one agent or actor within the system.
- Change is non-linear.
- Understanding change will involve understanding people and relationships, not just systems and structures.
- Change often takes long time.

The environment of advocacy programmes is unpredictable and this should be recognised in monitoring plans and procedures. Causes and effects can often not be clearly defined and may change depending on the context and circumstances. Monitoring of advocacy must therefore have a very strong emphasis on learning, both in regard to the context and the way it is changing, and in regard to the success and failure of interventions.

The tension between learning and accountability is frequently highlighted. Organisations often struggle with building M&E systems for donor accountability and then feel that there is **too much focus on donor accountability and too little on focus on the system's usefulness internally**. The two priorities often compete for limited resources and can seem to be in direct opposition.

Process: The session took point of departure in what the RAM standards states about learning, namely **RAM standards 16 and 18:**

16: Mutual learning within partnerships:

The organisation describes how mutual learning within the partnership relation has taken place

Mutual learning covering:

co-creative structures and processes with partners, including how it has been unfolded in practice

mutual responsiveness towards emerging trends

mutual openness towards different perspectives in the partnerships (incl. use of self-assessment tools)

18: Mainstreaming of learning

The organisation demonstrates that learning is mainstreamed into wider organisational learning (in work in Denmark and in partner countries)

Mainstreaming of learning based on:

evidence-based learning generated from programme implementation, evaluation and research

putting into practice learning from failures/non-achievements

replication of good practice, where relevant.

In addition to the above-mentioned standards, several other RAM standards include the formulation: *with critical reflection on lessons learnt....*

Learning is often not defined and the purpose is unclear. This also goes for the RAM standards: what type of learning should you report on? Organisational learning, learning at programme level, or?

In a learning process, the following questions are key:

- Who is being expected to learn?
- What purpose is the learning supposed to serve?
- What level is the learning process aimed at?

An organisation's learning culture is mostly unconscious and invisible to its own people, which can make the culture difficult to change. Before it can be changed it needs to be made more visible. A useful step in the process of unpacking an organisation learning culture is to become more aware of one's own learning. Jenny therefore invited the participants to reflect on their own learning:

What have you learned in the past five years?

Can you think of someone who has taught you something?

Can you think of a place where you have been where you have learned something?

Learning points:

Some donors seem to think that **more impact is sitting in learning**. This leads to rising expectations in regard to what learning can bring. A lot of pressure is put on local partners to make it easier for people up the aid chain – incl. INGOs and donors. Relationships promote learning – and **organisational learning capacity depends on: Leadership, clear Theory of Change, a culture of learning, trust in and support for staff, the organisation being networked and externally oriented, dedicated time and resources for learning.**

But learning doesn't come automatically or without considerable effort and leadership. **Genuine learning requires being open to surprise by bringing to light intangible and unexpected effects and contextual information**, which was not available initially. Staff is constantly observing the effects and paying attention to what they have just done, finding out what works and what doesn't, thinking about what is happening, what they could do next and what needs to change. In that sense learning is a disturbance to the system/the organisation. In other words, learning requires an organisation, which is prepared **to challenge the existing ways of working and established categories of meaning - and act - and adapt - on the basis of the new insights.**

Jenny shared the following **9 ideas**, which can promote a good learning practice:

1. Participatory analysis to learn at the beginning
2. The project pre-mortem (a way of accessing the underlying assumptions or concerns).
3. The front page - think about what the newspaper headline would be the day you win.
4. Impact log/scrap book: people are recording little bits of information during the course of the activity.
5. After activity review (question for reflection).
6. Learning review - includes a timeline (everybody writes down their learning - a team distils the learning).
7. Impact stories - situation: what prompted this initiative? Response, result, evidence.
8. Learning questions: are there questions that you would like to learn more about? Where would you like to feel more confident in 3 years time?
9. Open reports - simple reports that explore what happened and why - rather than answering questions.

For more information on the 9 ideas, see

<http://cisu.dk/Files//Filer/CISU/FagligtFokus/FF-web-doks/CISUDayforsharing.pdf>

In a complexity aware approach, non-linearity and non-predictability must be taken more seriously. Learning needs to embrace a wider variety of results, not just states (e.g. a policy adopted) but also people's behaviour, practice or perceptions. This emphasises the importance of relationships: **by stimulating dialogue and reflection among programme actors, space for collaborative learning is created and a deeper understanding of change can be observed.** Accountability, and being accountable, is consequently not just about whether one has delivered as promised. **Accountability**

is about being open to feed-back and about ensuring that time and resources are available for applying feed-back. In that way collaborative learning creates opportunity for context-specific information to inform adjustment of advocacy processes and to increase advocacy effectiveness. In a fast changing context **accountability is consequently closely linked to learning**, and recognising the importance of contextual information, and the inherent complex processes of social change, is a precondition for both an organisation's capacity to adapt and for its continuous relevance.

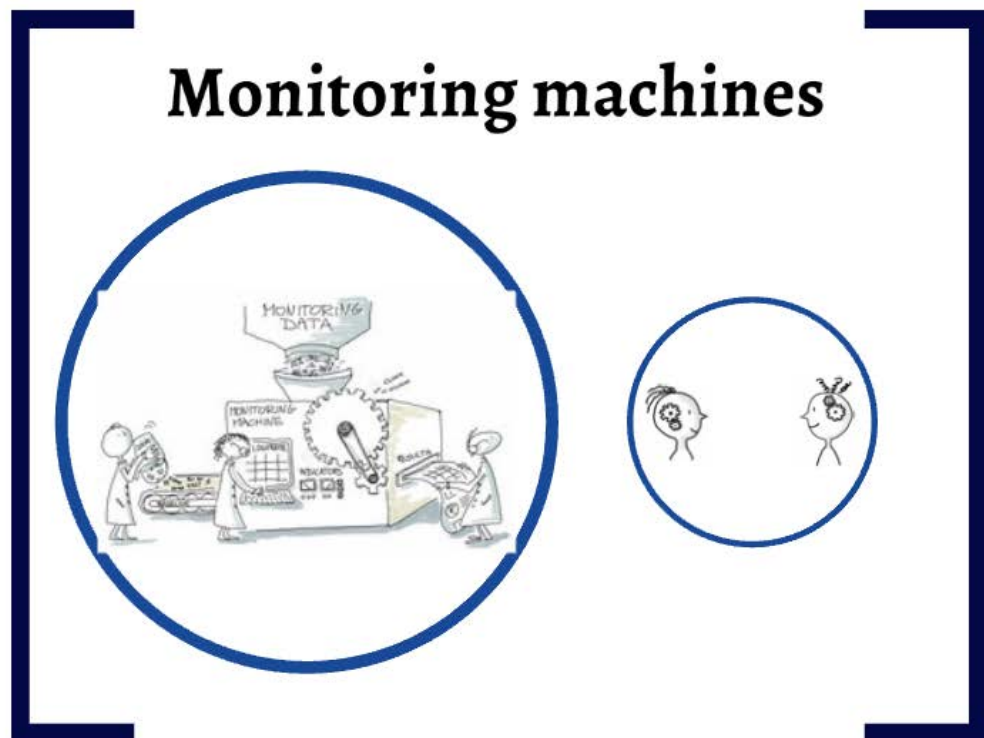


Illustration by Silva Ferretti

7. Professional panel – reflections and learning

Considering the experiential nature of the process, a Professional Panel was formed as earlier mentioned as a way to facilitate the active engagement of the participants.

Not all participants who took part in the first panel meeting have been able to attend the following meetings, and new participants have joined. In this way the process itself has been testing and potentially modelling the idea of applying a complexity aware approach to working and interacting!

Reflecting back on the process of taking part in the Professional Panel the participants have in particular valued the ability to identify and probe into questions and issues to be addressed in the process. In the beginning of the process working papers and reports were distributed among the panel members - the members would each read one paper and share key points with the others. All developed a short summary of key points from the paper, they had read (see Fagligt Fokus homepage for more). This way of **working like a study group** was by many found inspiring, also because the process provided opportunity for making own experiences available for further exploration. Sparring works best when those taking part bring a similar level of experience. **More members regret that they have only been able to take part in one or two meetings** and find that this has impacted negatively on the extent to which their organisation has benefitted from the process. Time is an issue, but several members are hoping to do **more professional sparring in future** – similar to the Professional Panel interaction. One member has gained inspiration in regard to applying a more flexible approach to monitoring as the process has confirmed that the context often is complex.

8. Issues to consider and way forward

Recent trends in international development have, inspired by results based management, contributed to bringing monitoring, and monitoring of advocacy in particular, higher on the agenda of many development organisations. The RAM standards reflect these trends. Parallel to this, inspired by systems thinking, there is an increasing recognition that **social change is complex, context-specific, dynamic and non-linear**. The degree of complexity can be explored e.g. by use of the questions reflected in section 5 of this paper. The point is that not all change or advocacy processes are equally complex and it is consequently important **to distinguish between types of advocacy interventions and approach each in the appropriate way**.

The process of exploring complexity aware monitoring of advocacy has suggested that we need **a greater rigour in our development practice**. The following are points for observation:

8.1 Relationships:

Dilemma/issue identified by workshop participants: Relationships are key – also in advocacy – but we seldom monitor these explicitly – how to?

Complex situations are characterised by the unpredictable nature of human behaviour, a multitude of unpredictable interactions between different actors with different perspectives, plus a wide variety of contextual factors beyond control. Gaining understanding of the various expectations, perspectives and roles of the different actors is essential and requires the ability **to appreciate, build and maintain developmental relationships**.

Possible action: An important first step would be to get more information about what the relationships are in a given context. A simple **mapping of the relationships**,

possibly by use of Silva Ferretti's tool for social network mapping, see page 9, is suggested.

8.2 Adaptive capacity:

Dilemma/issue identified by workshop participants: What are the implications for an organisation's/our sector's Theory of Change, if we adopt a complexity aware approach?

We need to approach social change and development in a more nuanced way if we want to deepen our understanding of complex change and ultimately improve results. In this process we will have to explore to what extent we can use our existing monitoring tools or whether we need different tools. And be open to the fact that **any organisation supporting social change processes will also change**. RAM and the present focus on Theory of Change, combined with RAM-reporting being conditional to funding, provides an opportunity for the involved organisations for systematically reflecting on their own functioning and monitoring practice. To what extent are we aware of what we do and the results we create – and how might we improve?

Possible action: A simple next step could be to initiate **an internal reflection process**: To what extent are the RAM standards and ToC helping us to deal with complex change processes? What needs to change in order for both the North and South based CSO and its staff to improve? Such a reflection process should not remain an isolated event within an organisation but become part of the organisational practice – and it could even be broadened to include joint reflection with peer-organisations.

8.3. Learning:

Dilemma/issue identified by workshop participants: Can monitoring for control and learning go hand in hand?

Due to the pressures of the results agenda many CSOs find themselves in a situation where **they are too busy to learn**. A framework like RAM risks reducing monitoring to reporting on predetermined results and an organisation's adaptive capacity and changed practice risk getting neglected in the process of being busy with satisfying the donor. There is a real danger that results get technically managed and reduced to a reporting exercise. But **learning from results needs to be made a reality!** In contexts of complexity and unpredictability learning is absolutely essential because "one-size fits all" - approaches are unlikely to work.

Possible action: A simple next step suggests to focus on establishing **short learning cycles**, if possible by building on the above 9 ideas for good learning practice. A good starting point could be to reflect on what learning is?, to whom? – and why it is important? Such learning cycles should be seen as separate from the RAM reporting process and be given equal attention!

8.4 Accountability:

Dilemma/issue identified by workshop participants: Many CSOs seem to prioritise upward and external accountability to donors and host governments at the expense of downward and internal accountabilities to partners – due to the funding conditionality the RAM standards seems to emphasise this?

We need to take a fresh look at accountability! Learning and accountability go hand in hand, as feedback is the process of communicating results and learning from development work to the various stakeholders. But a key question is to what extent complexity aware monitoring is compatible with the RAM standards? RAM requires aggregation of data from advocacy monitoring. In this process one should be aware that **without the context specific character, monitoring data is only able to offer limited insight into advocacy processes and results**⁶.

Possible action: A suggested next step is for CSOs to focus on how to establish a **greater rigour in our advocacy monitoring practice**. There is a need for distinguishing between **on the one hand** context-specific information, which should enhance our understanding of change plus ToC and also inform adjustment of specific advocacy interventions – and **on the other hand** aggregated data, which feeds into e.g. reporting on the RAM standards.

9. Concluding remark – Doing Development Differently?

The process on exploring complexity aware monitoring of advocacy has in subtle ways indicated that adopting a complexity aware approach has implications for an organisation's/our sector's theory of change:

“Future visions and common goals need to be openly discussed and negotiated, and tentative pathways forward charted. While some actions will be taken by individual agencies working alone, new layers of creative collaborative and partnering arrangements will need to emerge. In these situations agencies should look to theories of change, to go beyond linear paths of cause and effect, to explore how change happens more broadly and then analyze what that means for the part that their particular agency or program can play”. See: <http://learningforsustainability.net/>

⁶ Also a point raised by PSO and reflected in the INTRAC Praxis Paper no 26

Annex 1: Suggested reading:

Assessing Advocacy, by Ivan Barkhorn, Nathan Huttner, and Jason Blau, Stanford Social Innovation Review, Spring 2013

Advocacy Evaluation - Challenges and Emerging Trends, by Health Promotion Practice, September 2012

Complexity-aware monitoring, Discussion Note, USAID, November 2013

Dealing with complexity through Planning, Monitoring & Evaluation (PME) Mid-term results of a collective action research process, INTRAC Praxis Paper no 26, January 2012

Exploding the Myth of Incompatibility between Accountability and Learning, by Irene Guijt, available at: <http://www.snvworld.org/fr/publications/capacity-development-in-practice-chapter-21-accountability-and-learning-exploding-the>

From Best Practice to Best Fit: Understanding and navigating wicked problems in international development, ODI Working Paper, by Ben Ramalingam, Miguel Laric and John Primrose, May 2014

Monitoring and evaluation of policy influence and advocacy, ODI Working Paper, by Josephine Tsui, Simon Young and John Hearn, March 2014

“More of an art than a science”: Challenges and solutions in monitoring and evaluating advocacy, INTRAC M&E paper, Sarah Rose, February 2014

Organisations and Development - Towards building a practice, by James Taylor, www.cdra.org.za, for Swedish Mission Council, 2012

Pathways to Change: 10 Theories to inform Advocacy and Policy Change Efforts, by Sarah Stachowiak, Center Pathways Brief 2013

Tools to Support Public Policy Grantmaking, by Martha Campbell and Julia Coffman 2009, available at www.irvine.org.

Annex 2: Consultants and facilitator introductions:

The following consultants made presentations at the workshops – Marianne was the overall facilitator of the process:

Silva Ferretti has had the opportunity, throughout her work, to operate within very diverse programmes and contexts. The common threads through her work have been:

- A strong interest to action/reflection and sharing learning (How to create opportunities for thinking deep whilst doing? How to ensure that what is learnt – by organisations and people - is not lost and used?)
- A deep desire to ensure the involvement of the most vulnerable people as active actors (e.g. by designing participative methodologies and frameworks for programming, monitoring, accountability; and by engaging in evaluations with a view to systematize and share “voices from the field” rather than to be seen as “an expert”)

Silva couples a strong academic background with continued exposure to remote field locations. She believes that depth of thinking should ultimately lead to simplicity rather than over-complication. She is interested in learning from - but also in demystifying - new approaches. Silva carries a passion for communicating effectively ideas and findings (emphasizing the use of participatory methodologies at all stages, and sharing results using also photography, cartooning, videos, multimedia). Her vision for relief and development is to be anchored in values and principles, and to be engaging and fun for all those involved in them. Silva has worked on complexity-aware monitoring and has recently developed a manual on this for Save the Children International.

Contact details: silva.ferretti@gmail.com

James Taylor has worked in the NGO, civil society, social development sector as fieldworker, facilitator, trainer, organisational development (OD) consultant, manager and director and author since 1976. The foundation of his work is drawn from 14 years of field based community development practice. More recently he has provided OD consultancy and training services in many countries on various continents but remains most deeply connected to the challenges in his own country – South Africa. For eight years he was executive director of the Community Development Resource Association (CDRA) a Cape Town based agency promoting and supporting effective developmental practice mostly in non-profit organisations. He continues to work as a freelance associate consultant of the CDRA. His approach to his work is driven by an understanding of development as an essentially relational process based on an understanding of ecological systems. He sees the effectiveness of organisations as emanating ultimately from the nature and quality of the internal and external relationships that define them. He retains a deep interest and commitment to supporting effective fieldwork practice as a critical ingredient of development interventions that make a lasting difference to people’s lives. Other pastimes include furniture making, fishing, motorcycles and very occasional long distance bicycle races.

Contact details: james@cdra.org.za - www.cdra.org.za

Jenny Ross is a development consultant who has a focus on advocacy and influencing. She has worked as an advocate, and supporting advocates, at multiple levels from the grassroots to the UN Security Council. Jenny has developed innovative training and capacity building programmes - these include courses on advocacy planning, monitoring and evaluation and influencing and supporting change in complex contexts.

She also delivers an advocacy capacity building programme combining webinar, coaching and peer learning for advocates working in complex contexts. Jenny is currently conducting a study on the role grant making practice plays in promoting learning by grantees and has trialed new approaches to planning, monitoring, evaluation and learning with her clients who range from global campaigning organisations to partner organisations working on complex social change processes at the community level.

Contact details: jenny@jennyrossconsultant.com

Marianne Bo Paludan is social anthropologist by profession and has 20 years experience in process facilitation and organizational/system/procedure development in international development. She has been with Save the Children Denmark for many years – which included chairing the Children and Youth Network. She is now working part-time as Assessment Consultant with CISU/Civil Society in Development – and doing independent consultancies as part of her company ByMarianneBo.

Marianne has been working intensively with monitoring (approach, systems and procedures) learning and capacity building. She has been involved in change processes in regard to working in partnership with civil society organisations and government institutions. She is an experienced workshop and process facilitator and has been participating in and facilitating module-based capacity building processes both in Denmark and in the Global South. Marianne is interested in exploring the nature of change and the interaction between the individual, the organisation and the context in a change process. Engaging in change process requires openness, courage and will - at both individual and organisational level. Marianne believes that if international development is to bring about profound change, this is an area that needs to be further explored.

Contact details: mariannebopaludan@gmail.com

Annex 3: Professional Panel participants:

Ghana Venskabsgrupperne i Danmark: Bjarne Højlund Pedersen, Inger Millard, Lene Marie Andreasen

Sex og Samfund: Jacqueline Bryld , Mia Lund Sørensen

FIC: Maria Justiniano

Red Barnet: Casper Thulstrup

Plan: Katja Højlund Christensen

SOS Børnebyerne: Lene Godiksen, Emil Birk

CISU: Nina Lauritzen and Jeef Bech

Fortune teller

Sherlock Holmes



Illustration by Silva Ferrett