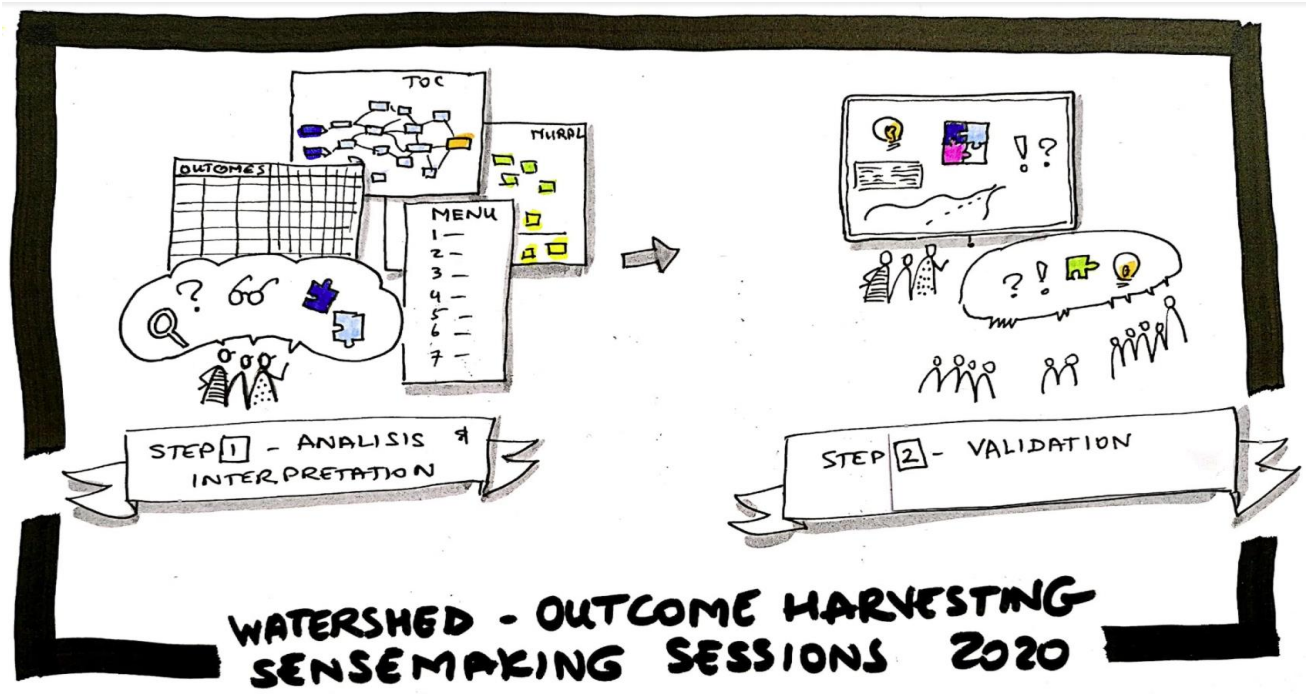
Watershed

Guidelines for the last Outcome Harvesting Sensemaking[1] workshop, May/June 2020



These guidelines describe the process for the last sensemaking workshop of the Watershed programme, adapted to be a fully online process. The **purpose** of the sensemaking process is two-fold:

1. Learn how to do analysis and interpretation of harvested outcomes.
2. Obtain insights on the monitoring questions as formulated in the OH design:
    a. How do the (pathways of) harvested outcomes that show progress towards improved environmentally sustainable and equitable governance of WASH and IWRM as well as to capacity development of civil society?
    b. What has been the contribution of Watershed to these outcomes? Where have the strategies been effective, where not?
    c. How do these outcomes confirm and/or challenge the ToC?

A **WP mini-team** consisting of the WP harvester, WP lead and possibly a second/third WP person with one member of the PMEL team will prepare the analysis and interpretation in detail and organise a validation workshop (eg a 2 x 2 hr session – tbc) with the full WP including all its implementing partners. The PMEL team member can act as facilitator to ensure full participation of all WP members. Like last year, the sensemaking will use all harvested outcomes since the start and consist of 2 steps: 1) analysis *(what do we observe when we organise the data? - this is about organising the facts)* and 2) interpretation (*so what does that mean in the light of our ToC?- here we make judgements).* The steps can be iterative as the interpretation may lead to new questions that require additional data analysis. These guidelines present a **menu** of 7 exercises that the mini-team

[1] sensemaking = analysis + interpretation. Validation = checking, deepening, modifying the 'full' sensemaking done by the miniteam. “Sensemaking' is the 'umbrella' concept.

can use, based on thorough reading of the outcomes. The order in which the exercises are presented does not necessarily need to be followed, nor do all exercises need to be done. Basically each exercise consists of the following 3 steps:

1. **Organise** the data (for the categories in the database that has already been done)
2. **Observe** what we see: name the facts: quantities, surprises, patterns, clusters, gaps.
3. **Interpret**: what does this mean? Answering this question is a qualitative assessment. However, it may be helpful to foster the discussion by asking participants their assessment in terms of poor/fair/good/excellent. Be mindful though that this is only meant to help people form their judgement and reasoning. The poor/..../excellent assessments in themselves have no meaning and therefore do not need to be included in any report.

The mini-team may decide to do the interpretation step with the full WP team, to allow for more participation and learning. It is a matter of balancing out this desire with the feasibility of doing an online workshop with a rather big group. Experience shows that online group sessions are best limited to 2 to 3 hours maximum. Key is that the mini-team prepares the full team and ensures the best possible allocation of time together.

These are the seven presented exercises that the WP mini-team can choose from, to analyse and interpret the harvested outcomes:

1. Rate the significance of the outcomes
2. Develop pathways of change
3. Compare and contrast the harvested outcomes with the ToC
4. Analyse and interpret the harvested outcomes per ToC element
5. Analyse and interpret the harvested outcomes towards influencing other actors
6. Analyse and interpret our contributions to the harvested outcomes
7. Assess the validity of the causal assumptions.

The WP mini-team will document the findings of each exercise in a short presentation, likely in a powerpoint or a mural, which they will present for discussion with the full WP team in the validation workshop.

Participants:

- For the preparation: WP harvester, WP lead, 1 or 2 more WP team members and 1 PMEL member (total max 4).
- For the validation session: Full WP team and 1 PMEL member

Roles:

- Ensure a facilitator and a rapporteur for each session. The PMEL team will as much as possible be available for facilitation.

Material:

- A full set of finalized and categorized harvested outcomes is needed to start the process. It is wise to put your full set in a google sheet for use during the sensemaking.
- We will make use of the online software **mural** to act as a "workshop wall" where we can use and organise cards, show pictures and draw maps. This software will be used during workshop sessions (using software zoom, MSteams or the like) as well as in-between sessions, when individuals work on their own on the sensemaking.
- outcomes and contribution (significance not needed) imported in mural as post-its
- Overview of the number of outcomes per category (actor type; ToC element; Watershed contribution)
- Set of causal assumptions (both the newly developed reduced set of global causal

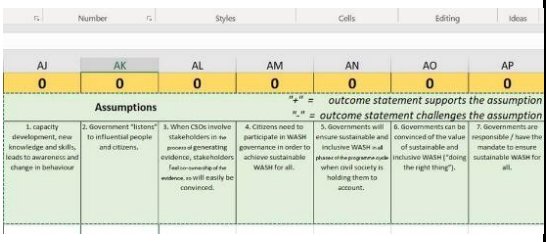
assumptions and those identified by the WP)
- WP ToC
- last year's ToC review session report (in annual plan 2020)

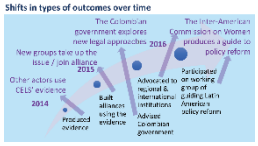
Time needed:
In view of the online challenges of the moment, we propose to shift the emphasis to the preparation session in a small group, the mini-team. Their work may take a few full days, alternating individual work with reconvening to consolidate information and prepare for the validation meeting with the full WP team.
The validation with the full WP team will take 1 or 2 two-hour sessions.
The script below has no time allocation as this will depend on the number of participants and number of outcomes - amongst other things.

Output:
Report with analysis and interpretation of harvested outcomes. This will be rich content to develop stories of change as a communicable product.

<table>
<tr><th>Topic</th><th>Method details</th><th>preparation</th></tr>
<tr><td>Mini-team</td><td>GETTING READY
this is a must-do to prepare yourselves</td><td></td></tr>
<tr><td>Preparation of the sensemaking.</td><td>1 Ensure that all members of the mini-team have read all the outcomes thoroughly as preparation for the sensemaking. If you haven't yet done so, review all the outcomes since the beginning of the programme critically and address what needs to be completed, both in terms of SMART outcome statements (dates! abbreviations!) as well as classification. We noted that the classification has not always been done consistently, which needs to be addressed. This step can actually start asap.
2 Ensure a full set that is classified is available. Enter an overview of categorised outcomes in mural. Example:
<table>
<tr><td>13</td><td>22</td><td>8</td><td>1</td><td>1</td><td>16</td><td>4</td><td>11</td><td>6</td><td>6</td><td>28</td><td>15</td><td>1</td></tr>
<tr><td colspan="4">Type of actor</td><td colspan="6">ToC element</td><td colspan="3">Watershed Contribution</td></tr>
<tr><td>national government</td><td>local government</td><td>CSO</td><td>other actor</td><td>data for evidence</td><td>Social Inclusion</td><td>Coordination, collaboration</td><td>WASH/ IWRM integration</td><td>Accountabiity</td><td>Budget</td><td>Training and capacity development</td><td>L & A</td><td>Knowledge Mngmt.</td></tr>
</table>
3 Read last year's ToC review sessions report. Identify anything that merits special attention during this follow-up exercise and jot it down as potential analysis questions (eg. follow up to a promising commitment by a duty bearer; scaling up; social inclusion; involvement of citizens; CSOs independently sustaining new lobby and advocacy behaviour).</td><td>Murals to be prepared per WP, possibly several for the different exercises</td></tr>
<tr><td>Mini-</td><td>ORGANISE THE DATA and MAKE SENSE - THE "MENU"</td><td></td></tr>
</table>

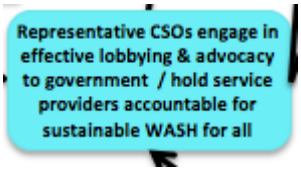
team		
Exercise 0a: **organise: Classify Causal assumptions**	The PMEL and PWG teams reviewed the causal assumptions of the overall Watershed ToC and redefined them into 7 causal assumptions. Add these assumptions to your database (see image on the right) and search for the outcome statements that either support or confirm ("+") the assumption, or challenge ("-") the assumption. Note that not all outcomes will need to be classified. In addition, you can also take two or three key assumptions of your WP ToC and search for the outcomes that support or confirm the causal assumption ("+"), as well as outcomes that challenge that assumption ("-"). Make sure that you work with the assumptions that you are most interested in to learn about.	
Exercise 0b: **organise: Add potential new categories**	Discuss whether additional categories need to be used to refine your analysis. For example: ● Each WP developed an advocacy strategy that specifies several 'sub-strategies' to be employed. In fact this is a subdivision of the Watershed Contribution category "L&A". If it is useful to categorise your contribution to the outcomes according to your various L&A strategies, simply add these columns in your database and categorise. ● It may be useful to further specify different Actor Types that changed in the outcome, eg village government; CBOs, citizens or media. Again, if useful, simply add the columns in your database and categorise.	
Exercise 1a: **Rate the significance of the outcomes**	Another way of making sense of the bulk of the data is to rate the harvested outcomes according to their significance. If you choose to do this exercise, it is best done at the start, so that you can benefit from it in the later exercises. While the significance section of the outcome statement already provides a qualitative assessment, a simple quantitative assessment of major/moderate/minor can help to filter what is most important for your analysis and make the exercise more manageable. This classification is however subjective, based on possibly different perspectives, and may result in different ratings among participants. This is ok and an entry point for discussion about the "why" behind the individual ratings. Do the rating individually: Add a significance category in the excel/google doc database with the 3 options major/moderate/minor. The preparation team can individually fill out this category for all outcomes. As an alternative, the rating of significance could be done after making pathways of change (see exercise 2a below), by simply marking with an * the most significant outcomes in the visual.	
Exercise 1b: **Discuss**	Discuss the rating collectively: ● Where do we agree on the most significant outcomes? ● Why do we think these outcomes are the most significant? ● Where do we differ in our assessment of significance and why?	

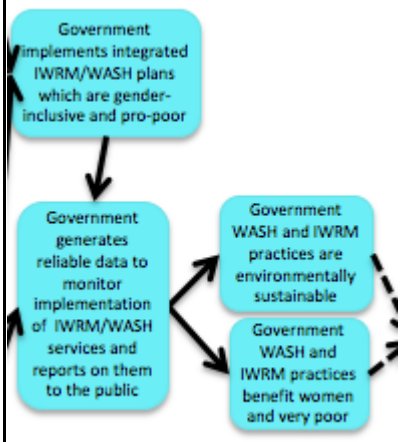


the significance rating	● Does this assessment lead to set certain outcomes aside from the analysis for now, for lack of significance and focus on what is important? ● With hindsight, would we formulate outcomes differently, or formulate different outcomes? Provide the most significant outcomes with an * in the mural post-it.	
Exercise 2a: **develop Pathways of change (or: outcome stories**	Read all the outcomes and identify potential pathways of change that can be distinguished. One pathway shows how (small, early) harvested outcomes lead to other (bigger) harvested outcomes can be organised around a geographical area, about one of the ToC elements or perhaps something else. It is a bit trial and error to see what emerges from your set of outcomes. Once you have identified what potential pathways you have, divide them among your mini-team and individually develop a pathway. (You can choose to do this together with another knowledgeable member of the WP team, eg from an implementing partner.) Organise the outcomes and the contributions into a chain, showing which activities (watershed contributions – one colour) influenced which outcome (different colour), and possibly which outcome influenced which outcome. Use mural for the visualisation that can take different shapes, see some examples below. It is not necessary to use all outcomes in the pathways (or mini stories), focus on the most salient stories.  	
Exercise 2b: **Discuss the pathways of actual change.**	Once you have the visualisation of the pathways of actual change, you can answer the following questions: a. Which actor types did we influence (most)? Which ones, identified in your ToC, are lacking? b. Why would that be? c. To what extent did you achieve the ambitions of the ToC and on which ToC elements? d. Which strategies (capacity development – knowledge management – various L&A strategies) did you apply? Which ones did you not apply? e. Why (not)? f. Do we have 'isolated' outcomes that are not leading to anything (yet)? If so, why is this? g. What do the stories say about the validity of each of our causal assumptions? Do they challenge the causal assumptions? h. Do you see scaling up of outcomes? Has there been mutual influence of working at different levels? i. If scaling up has happened, what made this possible? Besides your visual of the pathways of actual change, prepare a short story (in Powerpoint) that answers the questions above for discussion with the full team. These pathways of change can be a powerful tool to 'beef up'. In the	

	validation workshop, select one or two pathways that can be developed into a communicable story.	
Exercise 3: Compare & contrast with ToC	Compare and contrast the intended outcomes of the ToC with the harvested outcomes. Paste the A3 visualisation of the ToC in a mural, and write the number of 'matching' harvested outcomes (or even paste the full text of the matching outcomes) next to the intended outcomes of the ToC. Use this visual as input for the exercises below.	
Exercise 4a: **Harvested outcomes per ToC element - WHAT do we observe?**	● Look at all the <u>finalised</u> harvested outcomes, per ToC element and relate that to the ToC. ● Assign each person from the mini-team one or a few elements from the ToC (listed below): 1. Data for Evidence 2. Social Inclusion 3. WASH / IWRM integration 4. Coordination & collaboration 5. Accountability 6. Budget ● Each person reads all the harvested outcomes of the assigned ToC element and writes on mural post-its, one observation per post-it (this can be done offline): ***Observations[2]*; what do you see**; surprises (or the lack of), commonalities/differences, common threads, things that you are missing? Try to refrain from judgements and interpretation for the moment. ● Collectively, do we see any patterns? Insights, surprises, things that jump out (10-mins) *For example, when the PWG did this exercise in March 2019, they observed a lack of scaling up (outcomes were mainly at local level, not national level; no systemic change could be observed as of yet). Take into account your observations from last years sensemaking.*	Filter the harvested outcomes per ToC element in the database /google sheet. Make a format in mural so that we get comments per ToC element.

[2] Observation = factual; interpretation = judgement

Exercise 4b. **Harvested outcomes per ToC element** **"So what does this mean & why did this happen"**	● It is important to make this a separate exercise, as here, the core reflection will take place. As a facilitator, be mindful to stop discussions about what to do next. You can choose whether to hold this reflection in the same subgroups/individuals per ToC element or do this jointly in a plenary session. ● Looking at the observations made in the previous exercise, discuss ***what* can we learn from this**? This is an exercise in which we make judgements, interpretations, where we give an opinion. For example: ○ ***Why*** did this happen / why is this the case? ○ What makes you happy; what makes you worry? ○ What does it mean for (not) achieving our objectives? ● Write these on mural post-its and present to the full group ● Collectively reflect: do we see patterns, insights, surprises? *E.g. in the PWG March 2019 workshop, we posed the questions: why are there no signs of systemic change happening? How can we explain that the scale of outcomes is small despite scaling up (systemic change) being a crucial element of our ToC (because we aim at sustainable WASH for all)?*	In mural
Exercise 5a: What progress do we observe towards influencing other actors	● In the WP ToC, towards the end of the pathways, we aim to influence governments as well as civil society actors. This exercise looks at the harvested outcomes per actor type and relates this to what we aimed to change in these actors, as defined in the ToC. The changes we intend to see towards the end of the programme are found at the right-hand side of the ToC diagram, for example at Watershed Programme level: ○ The furthest away / most advanced *intended* outcome about **CSOs** is:  *Representative CSOs engage in effective lobbying & advocacy to government / hold service providers accountable for sustainable WASH for all* ○ The furthest away *intended* outcomes about the **government** are four very interlinked outcomes about government practice:	harvested outcomes filtered for each actor type in your outcome harvesting database

	 *Government implements integrated IWRM/WASH plans which are gender-inclusive and pro-poor* *Government generates reliable data to monitor implementation of IWRM/WASH services and reports on them to the public* *Government WASH and IWRM practices are environmentally sustainable* *Government WASH and IWRM practices benefit women and very poor* ● Divide the actor types from your harvested outcomes database that we will analyse among yourselves. Include the new actor types if you have defined these. At least look at the actor types government and CSO, but possibly other subgroups to work on local government, national governments, citizens, etc. ● Each person reads all the set of harvested outcomes for the assigned actor type and writes on post-its in mural **what you observe, what you see.** Look for surprises (or the lack of it), commonalities/differences, 'red threads', things that you miss. Use separate post-its for each observation. Again, try to refrain from judgement and interpretation at this stage. (colour coded - one colour per actor type) ○ ● Collectively, do we see any patterns? Insights, surprises, things that jump out	
Exercise 5b: **Influencing other Actors –** **So what does that mean? Why did this happen**	● Now that we know what the main actors (CSOs, government, possibly others) we aimed to influence are actually doing differently, discuss **what can we learn from this.** This is an <u>exercise in which we make judgements</u>, where we give an opinion. For example: ○ **Do we understand *why* this happened** / why is this the case? ○ Why is this important? ○ What does it mean for (not) achieving our objectives? ● Also, look at the intended outcome(s) in the ToC and answer: ○ what makes you happy? ○ what worries you? ● Write your insights onto the post-its in mural (same colour coding as exercise one) ● Collectively reflect: do we see patterns, insights, surprises?	Flipchart, cards, markers, tape…

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Exercise 6a: **Type of activity (Watershed contribution)** **What do we observe?**	This exercise looks at the Watershed contributions to the harvested outcomes and relates it to the Watershed activity-types (lobby & advocacy – possibly sub-divided; capacity development; knowledge). ● Now divide Watershed activity types amongst yourselves. ● Individually, read how we contributed to the harvested outcomes and: 1. Observe, what do you see; surprises (or the lack of), commonalities/differences 'red threads', things that you miss? 2. Write these down onto the post-its, one per card – difft colours for different activity types 3. Each individual presents findings back to the mini-team ● Facilitator takes notes on flipchart and/or clusters cards in mural ● Collectively as mini-team, do we see any patterns? Insights, surprises, things that jump out	3x sets of printed harvested outcomes filtered for each Watershed-activity-type. Markers, cards, tape, flipchart…
Exercise 6b: **Rank our level of contribution**	Collectively as a mini-team, draw a horizontal line in mural, like this Now classify the outcomes – ideally with the contribution - along the line, showing where we "made change happen" and where we contributed together with others. Note that rarely, we will have contributed alone, so the point is to gain insight into the *level* of contribution.	
Exercise 6c: Discuss our contributions.	**Observe:** what do we see? Are our contributions mostly alone, or in cooperation with others? Do we see clusters of outcomes that have something in common? Where are the most significant outcomes (*)?	
Exercise 6d: **Type of activity (Watershed contrib**	**Interpret** In the mini-team: now that we know what Watershed actually did that led to changes in behaviour in other actors, discuss **what can we learn from this**? This is an exercise in which we make judgements, where we give an opinion. For example: ● **Do we understand why this happened** / why is this the case? ● Why is this important? ● What does it mean for the effectiveness of our strategies. What do we need to do differently, stop doing, start doing?	Flipchart, cards, markers, tape …

ution) – **Interpr etation**	● What does this mean for the importance of working together with others? Write your insights onto post-its (same colour coding as above) ● Present the cards to the full group ● Collectively reflect: do we see patterns, insights, surprises? ● Write notes in 1 or 2 paragraphs, for later validation with the full WP.	
Exercis e 7. **Assess the validity of the causal assump tions** **interpr etation**	Each member of the mini-team will analyse 2 or 3 causal assumptions. Look at all the outcomes that either support or challenge the assumption. What do you observe? Write your observations PER ASSUMPTION on a post-it in mural. Plenary discussion – what does this mean for the causal assumptions? Plenary agreement on changes needed in the assumption (keep-delete-modify). Are there new assumptions that need to be added?	

FULL WP TEAM	VALIDATION	
	Purpose: - Review the preliminary analysis by the mini-team, enrich their interpretations and learn from implementing our programme - Review and assess the validity of the causal assumptions - first time! **After preparations done by the min-team, the full team can now be engaged.**	
Validation with full WP team – **Pathways of change**	Each pathway of change that the mini-team made, is presented, one by one. Take 40 mins per story. In plenary, ask participants to use post-its in mural to add: ● additional activities (define colour of post-it!) that need to be included ● additional activities from other actors (define colour of post-it) that should be included in the story Then discuss: ● What are the most significant outcomes? Participants indicate with * in mural. Plenary discussion:	WP team, 1 PMEL member

	● Were there contextual issues of importance? ● Can you explain why things happened this way? ● What were strategic decision making moments? ● Looking at your planned activities, what does not feature in the harvested outcomes? Do you understand why? ● What is your conclusion about what strategies worked, which ones did not work?	
Validation **Other exercises**	Each of the exercises you choose to do in your mini-team, can be presented to the full WP team. After presentation, these are guiding questions for each exercise-presentation: ● Do you have any questions for clarification? ● Do you have additional observations? Surprises, commonalities/differences per country, eg. is systemic change visible, are local-global linkages visible? ● Per ToC element: How do you assess progress towards achieving the ambitions of the ToC? Please explain WHY. (To inform the discussion, ask participants to score each element as POOR – FAIR – GOOD – EXCELLENT.) ● Per strategy applied: How do you assess the effectiveness of your strategies? Please explain WHY. (To inform the discussion, ask participants to score each element as POOR – FAIR – GOOD – EXCELLENT.) ● What can we learn from these achievements? Do we see any patterns? Insights, surprises, things that jump out? ● What do you think about the validity of the assumptions?	