



VECO Indonesia

## VECO Indonesia : A learning history



Compiled by Sherry Kasman Entus in collaboration with the management, program staff and selected partners of VECO Indonesia

For **PSO** capacity building in  
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October 2010



**How one visionary sustainable agriculture development organisation has used outcome mapping to help it become a true learning organisation, embrace complexity, and so, better assist small family farmers in Indonesia to improve their livelihoods**



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# Introduction

## About VECO Indonesia

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VECO Indonesia is one of 16 country offices in seven regions of the world under the umbrella of the Belgian NGO, Vredeseilanden (VE). Their shared mission is to contribute to the viable livelihoods and empowerment of organised family farmers, through sustainable agriculture, by supporting the development of sustainable agriculture (SA) chains and improving the position of organised family farmers within these chains.

VECO Indonesia works to realise this mission in selected areas of Indonesia, where it supports a range of initiatives to facilitate innovative SA production practices, value adding, and improved access to markets for organised family farmers in specific SA chains; to stimulate consumers to buy products from these chains; and to advocate for policies favouring the position of these farmers. VECO Indonesia is not a direct actor in these initiatives, but rather, a collaborating partner to local NGOs, farmer organisations, civil society and private sector actors.

In 2005-6, VE engaged in a global strategic planning process, in which the idea of becoming a learning organisation was embraced. Yet staff at both VE and VECO levels were frustrated by gaps between the espoused values and the actual practice of learning in the organisation. Among other things, they felt that the PM&E system in use, which was based on the logical framework approach (LFA), strongly limited feedback and insight on qualitative progress – both in terms of the internal functioning of the organisation and its contributions to developmental change.

These frustrations spurred many internal discussions and inquiries on how this situation could be changed. The search was on for an alternative M&E framework to respond to the limitations of the LFA, and to provide an opportunity for VE to truly become a learning organisation. In February 2007, VE made a bold decision to adopt outcome mapping (OM) as the guiding framework for its 2008-2013 program.<sup>1</sup>

VECO Indonesia was an early champion of the importance of organisational learning. Upon the 'green light' from head office in 2007, it initiated a multi-level and multi-dimensional organisational change process. This included the adoption of OM as its program framework, along with the development of a new

planning, learning and accountability (PLA) system (based on participatory M&E and utilization-focused evaluation as well as OM) as two core strategies to foster its growth as a learning organisation. Although all of the VECOs set out on similar journeys in parallel, VECO Indonesia was unique in having a full-time learning and knowledge sharing (L&KS) advisor to lead the way over an extended period of time, and thus, it has progressed the farthest along the path so far.

*VECO Indonesia: a learning history* presents the story of the evolution of VECO Indonesia's OM-based program framework and PLA system up to now, as experienced and jointly told by different individuals involved – ranging from the lead facilitator of the process to the management and program staff, as well as selected local partners of the organisation.

## About this learning history

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This learning history is one of several case studies commissioned by PSO to feed into two research initiatives that PSO launched in April 2010<sup>2</sup> to explore the relevance of various alternative PM&E approaches in development programs dealing with complex processes of social change. As such, it was structured in terms of three pre-determined topics that formed part of the larger research agenda of PSO, concerning how the integration of outcome mapping into its PM&E system has affected the learning capacity, partner relations, and vision of PM&E of the organisation concerned.

The VECO learning history was compiled by an outside consultant/researcher, working in consultation with a core team of three people strongly involved in the ongoing development of VECO's OM framework and PLA system. The compilation method used is an abridged, accelerated version of the learning history method – which was first designed by Roth and Kleiner at the Massachusetts Institute of Technology (MIT) Centre for Organisational Learning in 1995, as an action research method to capture the dynamics of the organisational learning process, and transfer the knowledge gained from pilot projects in one part of an organisation to another, or from one organisation to others.

The essence of the method is to allow everyone involved in a collective learning, innovation or change process to speak, so as to build up a story in multiple voices that offers insights into the subjective assumptions and experiences underlying the particular ways people acted and results produced. Once documented, these experiences provide a rich record people can learn from, and use to move towards new ways of working.

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<sup>1</sup> Deprez, Steff (2008) Towards monitoring that makes sense: Action research design of a planning, learning and accountability system for a sustainable agriculture programme in Eastern Indonesia, unpublished MA thesis, Department of Education (Leadership and Management) Rhodes University, Grahamstown, South Africa (pp. 99-102).

<sup>2</sup> These include PSO's thematic learning program on 'Balancing accountability and learning', and the 'Strengthening M&E in development programs that deal with complex social contexts' framework of the Development Policy Review Network (DPRN), in which PSO has collaborated together with the HIVA Research Institute for Work and Society of the Katholieke Universiteit Leuven, the Flemish Office for Development Cooperation and Technical Assistance (VVOB), and Vredeseilanden VE.



The key is joint reflection – through which individual learning is anchored in the shared learning of the organisation as a whole. Each step in the process of constructing the learning history – from initial orientation and planning, to research and interviewing, distillation, and writing and fine-tuning the document – aims to stimulate those involved to reflect on, articulate and learn something new about the topic concerned.

Once the consultant was recruited, and the core team and terms of reference established, the consultant and core team met to identify who would be interviewed and when, and the key moments that would provide the common frame for all the interviews. Based on this, the consultant formulated a set of open-ended questions for each topic and gathered further background information from organisational documents. She then conducted and recorded a series of individual and group interviews during two weeks in August 2010 in Bali, with ten people from VECO, as well as six people representing partner organisations for topic 2.

Next, another core team meeting was held in which the consultant shared observations on the patterns emerging from the recorded material, asked further questions to elicit views from the core team on these observations, and co-developed with them a set of reflections on what VECO has collectively learned, and what conclusions could be drawn. The consultant then excerpted, transcribed and edited relevant quotes (and in the case of interviews done in Indonesian, translated them into English) to form the core of the text of the learning history document.

The draft document was circulated to the core team for finalisation, to ensure that the quotes and reflections rang true. It was then sent to PSO for review and analysis (together with the other case studies commissioned) at a peer review team workshop in The Hague in September. Based on the peer review feedback, the consultant then edited and laid out the document to render it more accessible to a broader audience, and to serve as material for further learning and reflection by participants at the thematic learning seminar in November 2010 in The Hague.

## The structure and intention of this document

The VECO story unfolds in three parts related to the PSO research topics. In the first and largest part, the VECO management and program team reconstruct the process they went through in adopting the OM framework and developing its PLA system, with a special focus on how this process has affected their organisational learning capacity. The second part zeroes in on how VECO's application of OM tools with partners has affected the quality of partner relations – seen from both VECO and partner points of view. In the third part, members of the VECO team articulate how their visions of PM&E have changed since they first adopted OM, and also, reflect on the differences between working with OM and working with the LFA, now that they have had some experience using both approaches.

Each part of the learning history is subdivided into sections, each headed by a brief summary, written by the consultant, to provide the gist of the information conveyed by the primary quotes that follow it – which form the heart of text, and describe the experiences of the people interviewed in their own words.

Each chapter closes with the reflections, distilled by the core team based on the multiple responses on each topic. The intention of these closing notes is not to give a rigorous analysis or final conclusions, but to stimulate readers to reflect in turn on the understandings, ideas or questions that emerge from their own reading of the text.

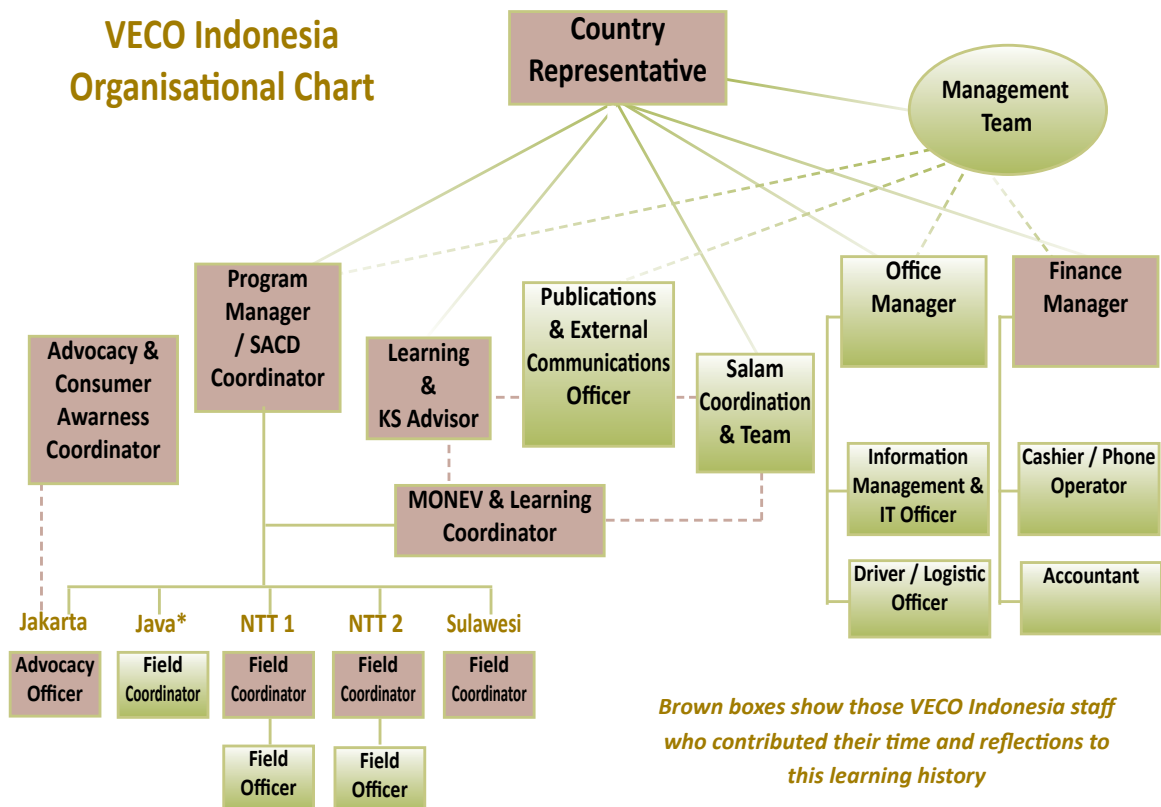
The value of a learning history lies not so much in the document itself as in the learning and reflection it may provoke. This is a living document, through which both the present readers, along with the original storytellers, are invited to participate in a continuously broadening process of inquiry. A process that will hopefully inspire more learning-centred PM&E practices, and more truly sustainable outcomes, in development organisations and programs dealing with complex processes of social change worldwide.

## Participants

VECO Indonesia staff who contributed their time and reflections to this learning history are listed in alphabetical order by first name below. The name used in the text is shown in bold font. Core team members are shown with an asterisk. The organisational chart below shows how their positions at VECO are linked.

<b>Alfons Urlings</b>	Program manager/sustainable agriculture chain development coordinator
<b>Hendrikus (Hengky) AM Gego</b>	Field coordinator, Labuan Bajo, Flores, NTT
<b>Hery Christianto*</b>	MONEV & learning coordinator (former field coordinator)
<b>Imam Suharto</b>	Advocacy & consumer awareness coordinator (former LIMS coordinator)
<b>Peni Agustiyanto</b>	Field coordinator, Sulawesi
<b>Purnama Adil Marata</b>	Advocacy officer, Jakarta
<b>Rogier Eijkens *</b>	Country representative
<b>Slamet Pribadi</b>	Finance manager
<b>Steff Deprez*</b>	Learning & knowledge sharing (L&KS) advisor
<b>Tonny S. Bengu</b>	Field coordinator, Maumere, Flores, NTT

### VECO Indonesia Organisational Chart



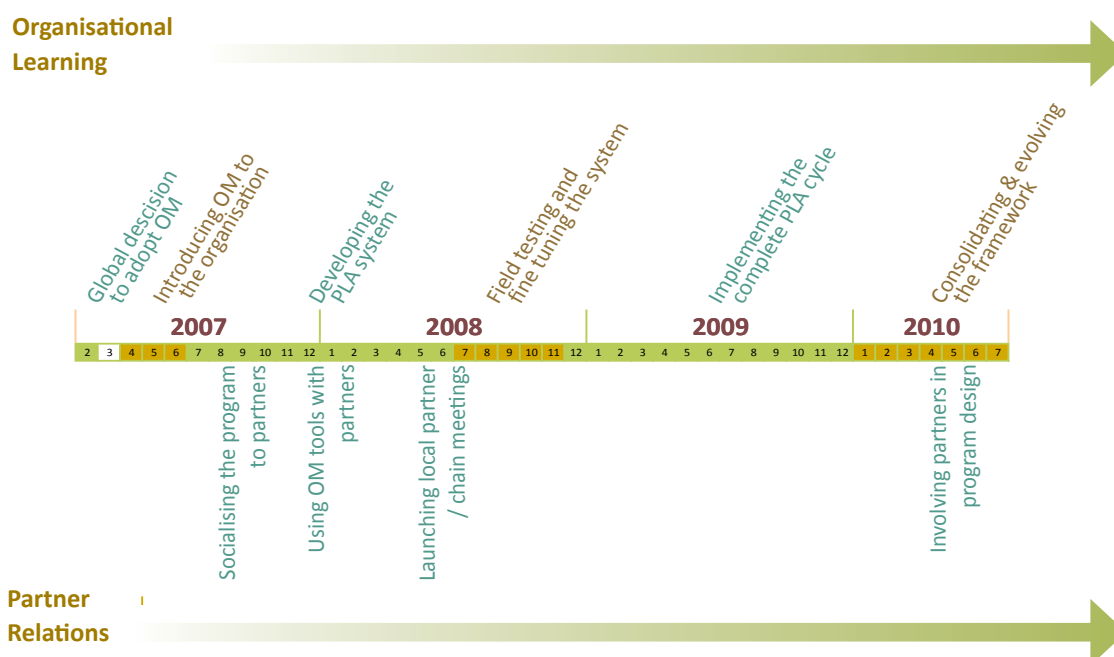
Additionally, six people representing VECO Indonesia boundary partner organisations (non-governmental and farmers organisations) contributed to chapter 2. They are, in alphabetical order by first name:

<b>Adam Musi</b>	DELSOS (NGO), Manggarai, Flores, coffee chain
<b>Edi Kende' Sumo</b>	APKT (FO), Toraja, Sulawesi coffee chain
<b>Endro</b>	LSKBB (NGO), Boyolali, Java, rice chain
<b>Eveready Lolo</b>	JALESA (NGO), Toraja, Sulawesi coffee chain
<b>Rensi Wawo</b>	LAPMAS (NGO), Manggarai, Flores, coffee chain
<b>Susatyo</b>	APPOLI (FO), Boyolali, Java, rice chain

The consultant responsible for compiling and editing the learning history is:

<b>Sherry Kasman Entus</b>	Freelance researcher, writer, translator and friend of VECO Indonesia
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## Key moments in the VECO learning history



## Outcome Mapping and Organisational Learning

*Until people can make their 'work space' a learning space, learning will always be a 'nice idea' – peripheral, not central. -- Peter Senge, 1994<sup>3</sup>*

Outcome Mapping (OM) is widely acknowledged as a learning-centred approach to planning, monitoring and evaluation (PM&E). It provides a conceptual framework and tools that development organisations can use to build organisational learning capacity and embed learning into their programming – and so, become more effective in mapping and achieving sustainable outcomes in contexts involving complex processes of social change.

Yet adopting OM will not automatically build organisational learning capacity or embed learning in a program. Even when an organisation invests in a carefully designed OM-based program framework and PM&E system, there is often a gap between the intended and the actual practice of learning in the organisation. Creating a learning-centred PM&E system requires more than positive intentions: real people in the real world must engage in a real-time, iterative and reflexive process of learning to realise the intentions in practice.

For this first and main chapter of the VECO learning history, participants reconstructed and reflected on the process they went through to gradually integrate OM as their guiding framework and create a planning, learning and accountability (PLA) system to bring the principles of OM to life. Their reflections are especially focused on the questions of how this process has influenced their capacity to learn from practice, and to apply the learning to improve subsequent practice, and how this capacity has evolved at key moments along the way.

### The story begins here ...

VE made the bold global policy decision to adopt OM as its guiding framework in February 2007. That was the official starting point. But the seeds were planted earlier, when the vision of becoming a learning organisation was first embraced. Mieke, VECO Indonesia's former country representative, and Steff, its new learning and knowledge sharing advisor, played seminal roles in inspiring these global choices.

From the local Indonesian team's perspective, the decision to adopt OM arose organically from their own informal talks about ways to approach the complex new program of sustainable agricultural chain development (SACD) they would begin in 2008.

<sup>3</sup> Senge, P., et al. (1994). The fifth discipline fieldbook: Strategies and tools for building a learning organisation. New York: Doubleday.

**Imam, advocacy & consumer awareness coordinator:**

For me, this story began long before VE decided to use OM. Even in 2003, the former country representative of VECO Indonesia, Mieke, was already seriously exploring ways to bring learning into our work, and encouraging the idea of learning organisations and PLA at the global level. I took leave from VECO in 2004 - 2006 to study in Wageningen, and toward the end Mieke emailed me about what job I would do on my return ... 'I'm creating a new learning and information management section (LIMS),' she wrote, 'Would you like to coordinate that?' I said yes to the challenge. I'd taken a one-semester course on learning and monitoring systems, but I told her, 'I'm no expert. I'll need an expert to work with.' Mieke agreed. Head office agreed.

We recruited an outside person, Steff, as our learning and knowledge sharing (L&KS) advisor. Together, we brainstormed ways to develop VECO as a learning organisation. We introduced a community of practice, a shared learning forum and knowledge cafes. Finally we came to the monitoring system, and Steff mentioned OM as a possible method. We had assessed that it was difficult to connect being a learning organisation with the LFA, because of its narrowness, inflexibility, and demand for quantitative details. We had an alternative: OM. We proposed it, and head office said, 'OK, let's go.' As it had to be a global policy decision affecting every VECO, it took a bit more time to take effect.

**Steff, L&KS advisor:** The real turning point came in January 2007 when all the VECOs were formulating the new 2008- 2013 program. I remember someone at HO saying, 'If we don't do it now, if we don't change the way we organise our programs and do M&E and learning now, we'll have missed a chance; it will be 2013 before we can do anything.' So, what actually made it happen was the pressure of the deadline to propose the new program. There was a new program focus and content across the organisation, and with that, a choice to embrace learning, and the kind of management system needed to support that. I mentioned OM – which I had worked with before in another NGO in Zimbabwe – as a framework that could facilitate more learning and reflection, and focus more on the process side of what we were do-

ing. Somehow that clicked. First, at VECO, then at the global level, where it caught the interest of some people, who invited me to introduce OM as a potential tool. Not long after this OM introduction workshop, it was decided that OM would be the guiding approach to frame the new program. Things moved quickly after that. The decision was officially communicated from VE to all VECOs ... In each region an expert was appointed to guide the process. I was appointed in Asia. All the others were outside consultants, since OM was still so new at the time.

**Hengky, field coordinator:** Until 2006 our program focus was on low external input sustainable agriculture (LEISA), along with advocating land rights and access to markets, but not yet on the whole sus-

tainable agriculture chain. Then, as part of VE policy, we began to update and expand our approach to focus on sustainable agricultural chain development (SACD), and we had to formulate a new program based on this. Then we asked, internally at VECO, 'Which approach will we use to formulate this program?' We asked Steff, who had talked with us about OM, 'Couldn't we use

your approach as the methodology for our new program?' I think the reason why we wanted to shift to using OM was not because we were dissatisfied with the LFA, but because of learning. For us, the LFA was OK. We were proud of our work in the field. Maybe because we had used the LFA for so long, we thought, 'OK, this OM is something new. Why not try it, to enrich our experience in designing programs?' I think this was our main personal motivation.

**Hery, MONEV & learning coordinator:** The first time I heard about OM was in a small community of practice meeting at VECO in 2006. We had long discussions about it, considering how we could use it in our work ... Personally, I agreed with the idea of using OM because it addressed the complexity of real communities. Using the LFA, we measured physical things and ignored what was happening with the human beings! I was very curious about OM, and looked up the IDRC to learn more. But it was not till the next year, when VE decided to adopt OM, that we received training.

What happened in the organisation to spur the idea of using OM?

Who was involved?

How did you take part?

What other important choices were made?

What factors brought the decision to life?

## Introducing OM to the organisation

In April 2007, the VECO Indonesia program team received training in OM, and immediately began planning the new program using OM concepts and tools. They quickly discovered that OM was no magic bullet! Even with a dedicated, expert facilitator to smooth the learning curve, it was a challenge to master the use of OM, after working with the LFA for so long. Ironically, even once they succeeded in integrating the OM framework internally, they could not just forget the LFA – which they still had to use in communicating with donors and others outside the organisation.

**Peni, field coordinator:** At first, I thought OM was not that far different from the LFA, but it was more human, as it measured the behaviour of the actors. If there were a farmer who would not speak up, but later became willing to do so to improve his bargaining position, the LFA would not measure that. But in OM, his role in making changes would count. That's what really stood out for me at first. Later on – our minds were punctuated by question marks: How could this idea be practically applied in the field? How did the results indicators fit in with OM? What were our roles? Our partners' roles? How could we measure our progress? We discussed all this at length. We couldn't apply it yet with our partners. First we had to grasp OM internally. We could not yet put all the definitions, all the things we were seeing in OM, into practice.

**Hengky, field coordinator:** **The new planning formats changed our focus. Before, when we used the LFA, we also changed behaviours and worked through partners, meaning that we also had strategies for building their capacities, yet we never measured changes at that level ... We were confused, and stayed confused for a while about the indicators, or progress markers. For us, the progress markers were just like the activities in the LFA. How could they be indicators if they were activities? Before, we had objectives, and put partner capacity building as one objective. But now we had outcome challenges and progress markers, all focused on partners ...The two approaches did not look parallel anymore!**

**Steff, L&KS advisor:** There was a certain sense of momentum, that now we really could change things! The moment we chose to introduce OM was also the exact moment we had to start to formally plan the new program. It was a double activity: a short OM introductory workshop was followed by four days during which we immediately worked on the programme framework and got to see the repercussions, what it would mean for us, technically, in terms of framing the program. There was a double feeling: of excitement – 'wow this is nice' – but also, apprehension, that now we actually had to do it. It was not the easi-

est method to use. We had to get used to it. I could see the first doubts coming up. How would we actually design a program using OM as a core idea?

**Imam, advocacy & consumer awareness coordinator:** Steff introduced OM to me before the training, and then I served as co-facilitator, since the training was held in Indonesian ... It was a real challenge for me: how to present all these strange new terms to the program section? it was not easy. Our framework was the LFA and the new concepts raised a lot of discussion – although in principle we agreed with them. It's a big change in mindset, to

move from the log-frame to OM – not something you can do in a one-day training! What was good is that Steff said, 'Let's just open them to it, let them think about it; it's an ongoing process that might take a month or a year.' We could not say no, anyhow, since head office had already decided: this is the new process. So we were actually forced to use it – not really forced, that's not the right word ... we had their full support. We were changing things around and they had already provided us with

the new OM proposal formats and monitoring formats to use for planning our program.

**Rogier, VECO country representative:** I assumed my position at VECO in April 2007. The decisions about OM were made before I arrived. The first thing I did was to sit in a workshop talking about strategies for the coming three years. The second was to participate in the introductory training on OM. And having got all that information, we were equipped to start writing the program proposal. I continued working on the proposal in the following weeks alongside Steff. It was not easy! I understood the concept more or less, but to really use it was a different matter. Because I worked intensively with him, I could quickly grasp the essentials – what we had to discuss and determine. But for the program team it was less easy; it took at least half a year for everyone to grasp the essence of OM and its pros and cons. Like everyone else, we'd all been trained in the log frame, and it was difficult to simply shed that, and move on without it. Still, I was very enthusiastic about the new approach. I saw lots of advantages, especially the

What was the training like?

What was it like to directly apply the concepts to plan the program?

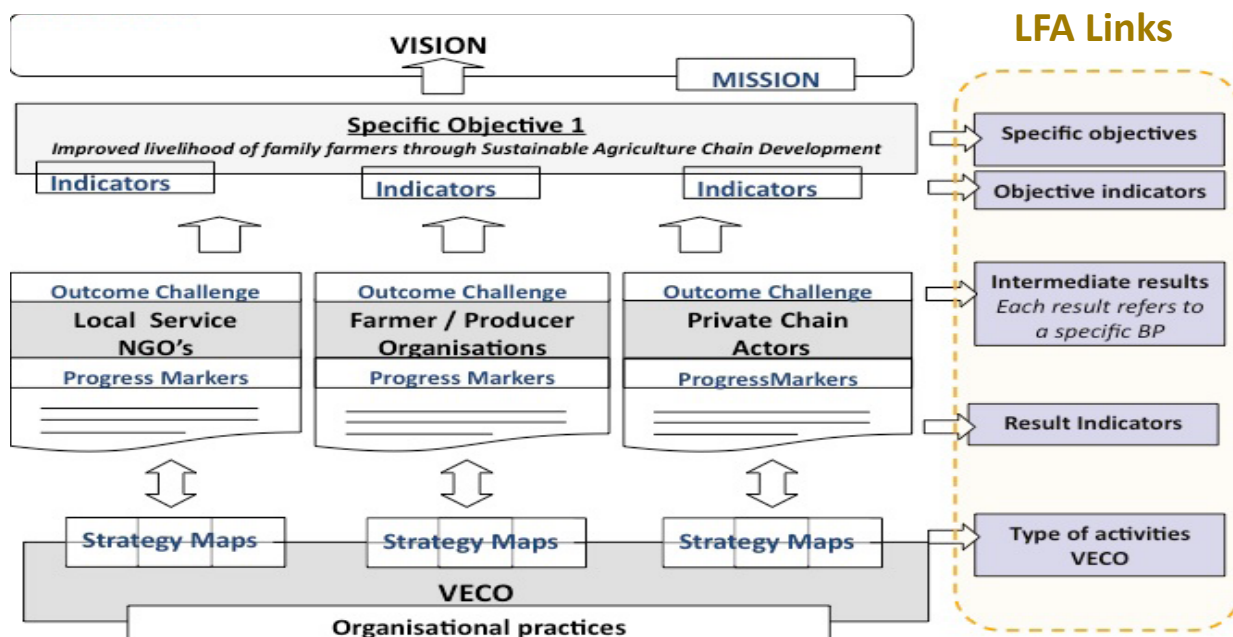
What aspects of OM did you find most interesting or most confusing at the time?

What challenges were involved?

fact that you could really say what you wanted to do or change with your partners, and not go much beyond that, since those were the only things you could control, and also, the ones you could best describe, set targets and indicators for. That was one of the first very positive things I saw in OM. The other was its flexibility. I saw that in using it as a program monitoring tool, you could actually adjust your intermediate goals, and so, be much less rigid. You still have the same big goals in mind, but you can vary the way you get to them. Some program staff were particularly resistant to change. That was a problem. It took them months to see and accept the advantages. What complicated things even more was that we

had to combine OM with the LFA in the proposal for our main donor ... Fortunately, Steff managed the feat of linking the two frameworks, for example, by linking outcome challenges with results, progress markers with indicators. That enabled us to convert the outcome maps into log-frames. So we did that for the donors, keeping OM as our internal framework. Basically it took a year for the team to really be able to use OM, and to feel comfortable with all the new terminology. At the same time, the development of the PLA system went into motion. Steff facilitated the whole process. He had a very clear vision and concept of where he wanted to go, and he led us there.

## VECO Program Framework 2008 - 2010



## Developing the PLA system

In July 2007, VECO Indonesia initiated a year-long process to develop a planning, learning and accountability (PLA) system. OM encourages a learning-centred approach to program management. Yet learning does not occur by itself! Sense-making needs to be systematically organised and facilitated to support continuous individual, organisational and institutional learning. A seven-step framework was used to guide the design of the system, although the process itself was sometimes messy and confusing. Yet the confusion was invaluable in building the flexibility required to run an OM-based program well.

- What was the development process like?
- What was your role?
- How did the process evolve?
- What were the most challenging aspects?
- How did the process affect learning?

**Hengky, field coordinator:** We had formulated our program using OM, and now, we had to figure out how we would monitor it. Our main role was to give input to the facilitator, who kept asking us: What kinds of things will you monitor? What information do we need? When do we need it? Who needs it? What for? He guided us step by step.

**Imam, advocacy & consumer awareness coordinator:** Before developing the framework for the PLA system, we went to visit an NGO on the island of Flores, to check what kind of monitoring system VECO had at the partner or project level. We had a small workshop with

the NGO to discuss it, taking the case of the cacao chain. We wanted to find out how chain development could best be monitored, and that generated some key ideas about ways to build the larger system. What I found most interesting was that we already had things going on in the field, a basic system that we could build upon for monitoring chain development. We also had a participatory planning and evaluation framework with partners to build on. We were not starting from scratch. But the challenge we faced was to introduce learning into the system, and that was not so easy. We had regular discussions with the whole program staff. At each monthly program coordination meeting, we always spent some time talking about the PLA development process, to recall the last step taken, then move forward. People were very enthusiastic. Without their contribution it would have been impossible to develop. As we reflected on our experience again and again, we were also changing our mindsets about monitoring. This was very important.

**Steff, L&KS advisor:**

During the training and initial planning workshop in April, and in the many days and weeks following, I realised that the OM program wasn't going to work without having a monitoring system very slowly built up together with the people. There were other plans at first – I remember talk of designing the monitoring system in two months' time. I could have done that on my own, but then people would not have carried or owned it, so I didn't really want to go that way (after all I was also new to the organisation and to the context of Indonesia) .. Fortunately, management fully supported the idea of slowly developing our own PLA system.

To me, using OM to design a program is only the first step. Afterwards, if you just impose a rigorous, top-down monitoring system, then you just have another kind of logical framework, as you are using it in a control-oriented way – which goes against the underpinnings and values of OM. You have to carefully design the monitoring system, develop an appropriate plan for it, and learn how far you can go with it in the con-

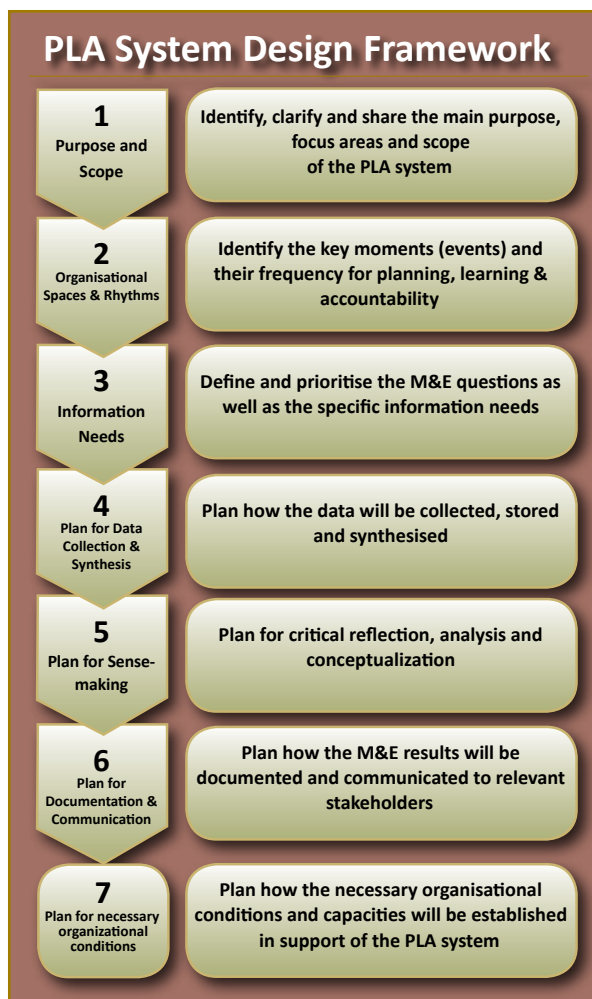
text where you are working. If there is one big lesson to share, it is that OM is not going to work unless you are willing and able to invest in changing the existing systems and processes, and in building people's capacity to learn from the processes embedded in the OM method. That is crucial!

I used a seven-step model to guide the development process, although the process itself was neither linear nor simple, and went through a series of different, sometimes overlapping core inquiry and sense-making events spread over a year's time. Although the model was clear enough, I was not clear on all of the specific, individual steps to be taken. I could see at most two steps ahead. The other steps emerged as we went

along. Meanwhile, the program of a busy NGO was in full swing, and there were key moments when we had to produce reports, reflect on things – moments that I used to fine-tune elements of the system, continually linking the process to the realities of VECO's routine work. All in all, it was quite a messy, often confusing process. Since it covered such a long period, it was easy for people to 'lose track', hard for them to stay tuned to the overall progress or see how all the pieces fit together. Sometimes people would say, 'I just can't follow anymore.' And then I would tell them, 'Very good, now we are learning!'

Some people left during this period but I think those who stayed learned a lot from going through the messy and confusing

parts and then from time to time putting the pieces together and going, 'Aha! That's how it is.' A big part of the idea behind the current PLA system is that you can plan for the next six months, and come together with your partners, and whatever we put in the program as a framework and progress markers and next steps, it can be changed, it is not fixed for the next three years. If there is one element that has contributed to an increase in the learning capacity of VECO as an organisation it is this flexibility. The notion of 'being able to change plans along the way' is more present now compared to the time when I started.



## Field testing and fine tuning elements of the PLA system

During the second half of 2008, the program team piloted new elements of the system in the field. Through trial and error, they arrived at more effective and locally-appropriate reporting formats and meetings for sense-making with partners. And they fine-tuned existing elements of the system to strengthen the links between team learning activities and program accountability, at a time when several other major changes were transforming the organisation. It is tricky to pinpoint the effects of any one change in isolation from the rest, as they were interrelated in myriad ways, but the PLA system began to be vital, in this context, as a vehicle to help people make sense of all the changes.

**Steff, L&KS advisor:** In this period we introduced many new elements that still exist today. We also tried some things that didn't work and were deleted. We changed the whole reporting system. In OM you focus on boundary partners. So, all the report formats and sense-making events were also at first focused on the partners and their outcomes. But it was sometimes difficult to make the connection with the changes in the respective SA chains, or to see how partners' changes were relevant to developments in particular chains... So we adjusted that. We introduced local partner/chain meetings as a key sense-making tool. At first we had continued to rely on written reports from partners, assuming that these would include in-depth reflections on progress markers.. But self reflection on progress markers did not prove to be straight-forward. So we decided to do it together in local partner/chain meetings for each chain and area. While we sat together we had the added benefit of a powerful moment in which we could directly report on changes, decide on steps for the future, then just record what was decided and move on. Based on this, we decided, 'let's forget about the symbolic accountability of having partners send in long written reports to VECO.' (the previous partner report with an average of 40-50 pages was reduced a 5-10 page document).

**Hery, MONEV & learning coordinator:** Before we implemented OM, we used to do project cycle management – planning, implementing, reporting – but a lot of learning was lost in the cycle. We had tried adding learning to the cycle through activities such as the Net-COP, annual partner meetings, conceptualisation workshops, but they were unstructured, unlinked to the program, and if we were busy we might miss them or even cancel them. The changes we made as we fine-tuned various elements of the PLA system was to increasingly combine learning with accountability, by making the events more focused, more structured and more regularly scheduled, along with having a 'watchdog' to keep peo-

ple focused on learning and reflection as a key part of program accountability. There were so many changes going on all at once in 2008, that we were sometimes very confused; it was useful to have events to guide us to make sense of what was going on in a structured way.

**Ch-ch-ch-changes!**

**Rogier, country representative:** Indeed there were many other factors at play that influenced big changes at VECO in this period ... Aside from adopting OM and developing the PLA system, we had also made a radical shift in our program by refocusing it on SACD. This led to the question, 'Do we have the right resources for this program?' In response to this, in January 2008 we had hired a consultant to conduct a participatory organisational capacity assessment (OCA). As a result of the OCA, we created new job descriptions, and people had to reapply for the jobs. Starting in the second half of 2008, some people shifted positions. Others left the organisation – mainly those who were most resistant to change. And new people came in,

who had nothing to resist, since they were new. We also intentionally recruited people who were open to trying new things. Important shifts were also made in the organisational structure – such as the decision to bring the learning and knowledge sharing section inside the program section (rather than being outside of it, as it had been until then). And a decision was made to establish 'field antennae' or branch offices whereby field coordinators would be based in the regions starting in 2009. We were also gradually reducing the number of partners we had (from 34 to 21) and the number of districts we operated in (from 27 to 17). These two changes would allow the field coordinators to have better access to the local partner/chains and chains. 'Home weeks' were then added to the PLA cycle as peer learning events, five times a year, for the program team to gather, discuss findings and challenges, build common understanding and concrete strategies. All

What new elements were piloted?  
What changes did they bring?  
Were all the changes positive or did some of them produce challenging or unwanted results?  
What other important changes were made?

these changes were designed to enhance the capacity of the program team, and were accommodated within the PLA system in various ways, although they did not happen because of the PLA system. However, the biggest influence on organisational learning, in the midst of all this change, were the reflection and sense-making events in the PLA cycle – which we were now regularly attending as a whole organisation.

**Hengky, field coordinator:** One change that worried me at that time involved the communications between our team and the farmers. In the OM approach we had to monitor mostly at the partner level since our interventions were directly with them. So we measured whether we were successful or not at the partner level, not the beneficiary level, which we only indirectly impacted. In comparison, in the monitoring we did using the LFA, we

met together with each NGO and many of the farmers it assisted in a big workshop each semester, and on the last day we would have a meeting only with the partners at the office, after we finished meeting with the farmers. In the new local partner/chain meetings, only about five percent of the farmers were involved, as representatives, and that was mainly when we discussed the progress in chain development, to which the farmers could contribute. But when we moved on to discuss the progress markers of the partners, it was not interesting anymore for the farmers. Our feedback to Steff was, ‘Please let’s not forget to include the farmers in our monitoring.’ He invited us to make some innovations in the discussions we held with the farmers’ representatives on the first days of the next local partner/chain meetings.<sup>4</sup>

## Launching the first complete PLA cycle: putting learning into practice

As 2008 turned into 2009, all the pieces of the puzzle fit together. The PLA system took tangible shape and began fulfilling its intended aims: putting organisational spaces for sense-making at the heart of the monitoring process, and weaving them into the regular rhythms of the management of an action-oriented NGO. A complete continuous learning cycle had been created, through which learning could now be systematically applied, to inform decision-making leading directly to improved strategies, policies and practices.

**Hengky, field coordinator:** For me, what we learned in 2009 is summed up by the three letters: ‘P’, ‘L’, and ‘A’. Now our planning was coming out of our learning, so we could show accountability in our program. This reflected on what we had to do in monitoring. Monitoring now was no longer just something we did to collect data to make reports. Rather, it was an integral part of a continuous learning process. This was what the PLA system emphasised. We also had to really show our accountability – to our target groups, to our partners, and then to our donors. This is the concept we truly learned at this time. We were putting the new framework into practice.

### Main organisational spaces (events) and rhythms of the VECO Indonesia PLA system

ORGANISATIONAL SPACES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
<b>PLANNED EVENTS</b>												
Assessment partner proposals												
Annual budget plan VECO Indonesia												
<b>Home weeks</b>												
Knowledge cafes												
<b>VECO staff learning &amp; reflection week</b>												
VECO Asia Regional meeting (RELI)												
<b>Local partner /chain meetings</b>												
<b>VECO mid-year reflection</b>												
National Partner meetings												
<b>End of Year evaluation meeting</b>												
<b>Overall planning meeting for next year</b>												
Monthly management team meetings												

*Events in bold are seen as the key sense-making events*

<sup>4</sup> The issue of less direct involvement with farmers in monitoring and evaluation was later addressed. In 2009 VECO Indonesia began for the first time to work with farmers’ organisations as boundary partners.



**Steff, L&KS advisor:** The very end of December 2008 and beginning of 2009 marked a peak moment in our functioning, when all the elements came together. We were ready to run the complete annual cycle of PLA activities in the system we had created. In terms of learning capacity, this time was marked by a consolidation of learning and also, a leap. There was a conscious realisation that, 'Aha, this is working.' ... We had the sense that now we had the right people, who were both willing and able to make it happen ... As a result of the OCA, there was a very positive, constructive shift, and the new people who came in brought the PLA system to new levels.

In this period too, for the first time, we dared make changes in the program directly based on our learning. At the end of December 2008 we held a year-end reflection in which the ideas emerging from the reflection were directly linked into concrete plans for the coming year, including some major decisions about changes in partners and strategies for chain development. There was a direct bridge between our insights and our ability to make program adjustments that was highly motivating. The structure and the willingness of management and the people were in place to actually take lessons learned and use them for informed decision-making.

As for my role, everything came together in a process I had facilitated. I felt I had to steer a bit hard to get the whole puzzle to fit together on time to seize the opportunity – of being at the end of the year and about to start a new one – to put that puzzle on the table and lay it out for all to see. Once that was done, a local staff member, Hery, was put into place to continue my job in coordinating the PLA system, and we developed a routine. I was still somewhat involved in the PLA system but my key focus shifted to installing the local partner/chain meetings and the home weeks at VECO level.

**Imam, advocacy & consumer awareness coordinator:** The first important shift to promote organisational learning in this period was that the learning section

was integrated into the program section, so the new MONEV & learning coordinator, program manager / SACD coordinator and I (in my new position as advocacy and consumer awareness coordinator) shared an office and worked as one team. The second was that the people on the program team were all selected for their positive attitudes toward learning and commitment to VECO as a learning organisation, as well as their qualifications. Also, Steff was an expert facilitator. Due to these factors, the implementation of the new system worked very smoothly.

**Hery, MONEV & learning coordinator:** When the OCA led to the re-positioning of learning and knowledge sharing as a part of the program section. Steff and Rogier encouraged me to apply for the new coordinator position for this. As a field coordinator, I had always been very inquisitive about OM and other approaches to M&E, but it was not my area of expertise, and I wasn't convinced I had the skills required. I agreed to try on condition that they would train me and that everyone else agreed I was right for the position.

The shift into the new position was gradual. I worked on improving my skills, and attended some trainings to prepare for it. Once I fully assumed the position, the biggest change was that everyone now came to me to ask me about how the program was progressing. I quickly gained an overall knowledge of what was going on in the whole VECO program, and learned new ways of communicating with other staff.

The significant change at the level of organisational learning was that attending the regular PLA events was becoming a habit by now. But there were still constraints on our learning within VECO because we had the means and the opportunities to learn, but not everyone was always motivated. It was my responsibility to keep reminding them to take advantage of the opportunities, and keep looking for approaches and techniques to elicit learning and motivate them to learn.

The organisational capacity assessment infused new blood into the organisation – individuals who entered the picture when the OM-based program and the development of the PLA system were already well underway. Bringing new eyes and know-how to the mix, they observed some critical information gaps – and used these gaps as opportunities to bring new ways of knowing on track, to support improved data quality, decision-making and accountability in the areas of finance and market chain development.

### Alfons, program manager/SACD coordinator:

Before VECO I worked in a similar job for USAID-funded, LFA-based programs on sustainable agriculture chain development. Reports were periodically filled with the data donors wanted to know, no qualitative data, no feedback on the reports, and that was the extent of monitoring.

When I first started at VECO, Steff explained to me how OM worked and I thought it sounded like a much better system because it included qualitative aspects. But then I discovered there was little or no quantitative data available. Although baseline studies had been completed for some of the market chains, we had very little information on others, and what was available was scattered in various separate documents.

Another problem that quickly became obvious was that OM requires very good, knowledgeable people. If you have people like that then you get much better results than if you use the LFA. But without good people, especially partners, who really know what they are doing, the reports produced are not worthwhile. With LFA-based reports the job is simple, you just gather and fill in certain numbers, and your job is done. OM information gathering and reporting is much more time consuming and requires a higher level of capacity. The capacity building itself, regarding what information to get and how to get it, takes even more time ... partners were often unclear about the differences between 'activities' and 'outcomes', so this reduced the value of their reporting, which formed the basis for ours. The introduction of the local partner meetings had helped a bit ...

But still, the data generated through this process was often unreliable. A recent example of this is that one or two coffee farmers in a meeting reported that they had a 400% increase in income that year. Then this got translated into a statement in our annual report to donors that coffee farmers in that area had experienced an average income increase of 400%. We began to address such problems by analysing and specifying a clear set of market chain parameters

and information needs, to build a baseline database for each chain, starting from the end of 2008.

We made a plan for how this information could be systematically collected and then fed into a single 'living chain monitoring document' that could be continuously updated as new information emerged in each chain.

### Slamet, Finance manager:

Before I came to VECO, I worked in very large organisations with long chains of top-down command, where changes in activities and budgets were difficult or impossible to make. At VECO the chain of command is much shorter. I could immediately see that the OM framework was ideal for VECO because it allowed for the flexibility to modify the activities used to achieve outcomes, in order to be more responsive to emerging beneficiary needs. The budget at the level of these activities was also flexible, but must address improvements over time. As soon as I started the job, I became directly involved in team learning events, which enabled me to gain an understanding of the activities attached to the budgets, and the program section to gain an appreciation of financial aspects of their activities, and the usefulness of budget monitoring in program monitoring.

Finance was not yet linked into the PLA system. Budget reporting was done using only the four general headings of investment, operational, training and meeting, and personnel costs, which did not provide much information of value to the program staff for measuring their progress. So we set up a system for more detailed monitoring of expenditures on activities related to specific progress markers. We also conducted assessments with the program staff and with partner organisations to develop templates for financial reporting that could meet their finance monitoring needs, to provide useful information to support interventions and planning, and then we consulted with them to fine tune the templates for use.

## Consolidating and evolving the system: sustaining the momentum of learning

This year, the local program team have taken full ownership of their OM-based program framework and PLA system. They are consolidating what they have gained, after a period of radical change, and sharing their knowledge with others. Pooling their collective learning in the past three years with that of other VECOs, they have participated in a global-level revision of the design of phase 2 of the program (2011-13), which adds a new layer to the original framework, and is more strongly targeted to empower farmer organisations, and to better respond to the priority issues of specific partners in specific local chains.

### **Imam, advocacy & consumer awareness coordinator:**

The significant change this year is that the PLA system is well settled, along with its infrastructure, including an integrated IT system and database. There has been a smooth handover of Steff's role to Hery, a local person, to coordinate learning and monitoring, and program team members, along with some people from partner organisations, are serving as the facilitators for PLA events. We own the system, and learning is central to our work!

### **Hery, MONEV & learning coordinator:**

Now that Steff has left I facilitate and coordinate learning events on my own. The biggest difference in learning capacity that I see today is that the people on the program team are very motivated to keep improving their capacities, and are initiating and exploring new ways to document what they are learning from the activities they are involved in, such as farmer field schools and advocacy campaigns, in CDs or books they can distribute to others. We have also published an Indonesian language handbook on OM in collaboration with AusAid - ACCESS. VECO Indonesia was a very inward-looking organisation for a long time. This year we have been increasingly communicating our learning outside the organisation; we have the confidence to share our experience with OM and PLA. Our field coordinators are often invited to make presentations, and I am continually receiving requests to consult for organisations who have started using or are interested in learning more about OM.

**Slamet, Finance manager:** This year I have continued to spend a lot of time working side by side with partners to build their capacities and to give them input – not only on how to manage and monitor their budgets, but also, on how to increase their accountability to their own members and/or partners, and improve their self-funding arrangements. This has taught me a lot, especially since many of the partners are newly formed farmer organisations with an embryonic level of capacity in organisational and financial management.

**Peni, field coordinator:** Now that we have been working with OM for some time and are implementing the new PLA formats for partner monitoring and reporting for the second year, I think our new approach is really more appropriate than our old one, especially for my region, which only has one field staff. Limiting our focus to the partner level and expanding our network to include more chain stakeholders have enhanced the program's effectiveness. Before, I had to work very hard, all the way to the village level, travelling large distances. Now I have less footwork to do. At the same time, I have a much better grasp of the overall program, where it is headed, and how well it is progressing.

### **Rogier, country representative:**

As a result of organisational learning, we have developed a new chain intervention framework (CIF) for the 2011-13 program, which is more strongly targeted to strengthen farmer organisations and address the priority issues in specific chains in specific areas ...

The disadvantage of OM is that you are not measuring impact level results, such as changes in farmers' income or changes in the prices of commodities ... We realised we still needed this kind of information, especially for accountability purposes, and have added these elements in the new CIF.

We have also been increasingly taking on farmer organisations as partners. This allows us to more directly influence our beneficiaries as direct boundary partners. In terms of learning capacity, the team is much better prepared than before to implement this program and to learn. There is little resistance to learning. PLA has become routine, although the system is still continually being improved. The home weeks in particular give the program team a regular opportunity to address important issues and explore new themes ... The financial aspects of the program are also far better integrated, as field coordinators are responsible for managing and monitoring finances to support progress in each district.

In the third year of the OM/PLA system, what changes have come as a result of the collective learning of the organisation?

How far do you feel has VECO come in improving its capacity to learn?

What are the most significant lessons learned this year regarding OM and PLA?

**Alfons, program manager/SACD coordinator:** The main reasons for the changes we've made to the framework, were that, although officially, the main focus of the program was on sustainable agricultural chain development, this was not the main focus of the monitoring system. To develop the CIF, Steff and the program staff gathered information from partners on what the real issues in each chain were, so that we could prioritise them and work on solving them – which is why we are here. Now each partner has their own outcome challenges, corresponding to their roles in solving issues specific to their own chains, and progress markers that fit their own situations and capacities.

The data we will gather on chain results will provide a better balance of qualitative and quantitative information, most importantly including basic information related to farmer incomes, production yields per hectare, and product quality ... Up to now, we have been monitoring many things, but not always the ones that are most important. Most of our information on average production yields, for example, has been mainly based on statistics from the Department of Agriculture, rather than from the farmers we work with. So the system we have planned will involve the partners in regularly gathering such information under the supervision of the field coordinators, from sample sets of 20 selected farmers for each of 13 chains ... Also, I want the field coordinators to visit these farmers periodically to verify the data. This is challenging in the case of chains such as cacao or coffee, which are not harvested seasonally, but on a weekly or even daily basis.

**Steff, L&KS advisor:** By 2010, Hery was formally in charge of coordinating the PLA system and I was there only to give extra support as needed. I was assigned to coordinate the proposal for phase 2 of our six-year program (2011-13) Since a lot of change had taken place in the program, there were a lot of new emphases, content-wise, and we changed the framework a bit to create what we called the 'chain intervention framework' or CIF. It is similar to what was there before but has an

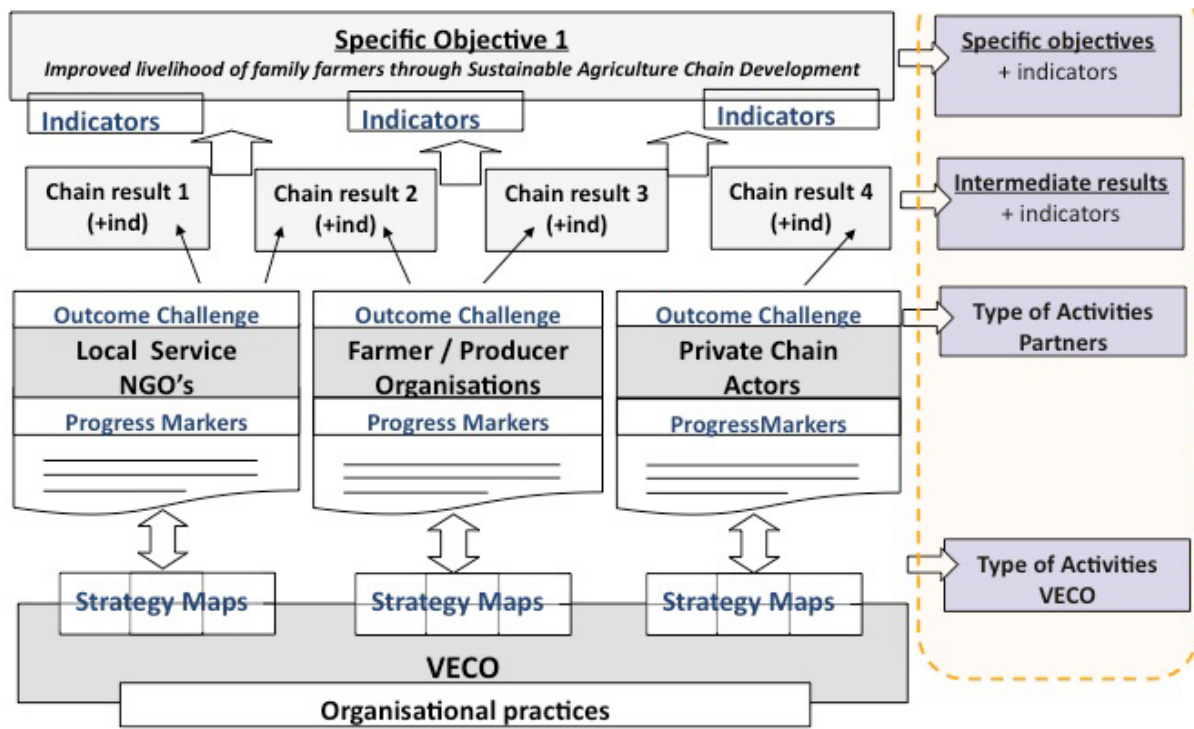
extra layer. The choice of the name was to get away from saying: 'we are doing outcome mapping' to saying: 'elements of OM inspire our program framework.' In the first phase, the framework was heavily inspired by OM, but we saw – globally and in Indonesia – that there were some shortcomings. To the new CIF, which still has the basic elements of OM, we added elements from results-based models, so as to better fit our context of facilitating market chains.

We added a layer above the level of the outcome challenges for the boundary partners, consisting of very tangible results in the chains. OM spells out very clearly the need to focus on the behavioural changes of actors that precede such results, in order to understand the process of change, which I still believe is valid. But it is also essential to keep track of what it is that you really want to change, and commonly agree with your partners on the specific situations you aim to change, for example, in the Toraja coffee chain: is it the quality of the coffee too low? Is the marketing system not working optimally? Are farmers not well organised enough? Based on an analysis of the tangible results we wanted to achieve, we identified who was going to do what, and which boundary partners were crucial. This brought more focus and agreement on specific changes we want to make. The framework proceeds from VECO to our strategy maps to support the boundary partners; to the boundary partners, each of whom now has a specific outcome challenge and progress markers; to a set of tangible chain results – which, we believe, if achieved, will make a sustainable difference in farmers' lives.

This change adds an important layer of information, for us and for our donors as well as the public. It entails additional data collection but does not change the OM/PLA system itself. We have been through a period of drastic change, so for the next few years, there is no need to make major changes, only to consolidate what we've already got. The conditions for learning are in place. It is in the next few years that we will really be able to see how well the system works to support continuous organisational learning.



## VECO Program Framework 2011 - 2013



### Core team reflections

The PLA system has become such an integral part of our program that now we sometimes do not realise anymore what is (strictly) PLA and what is not. Based on our experience so far:

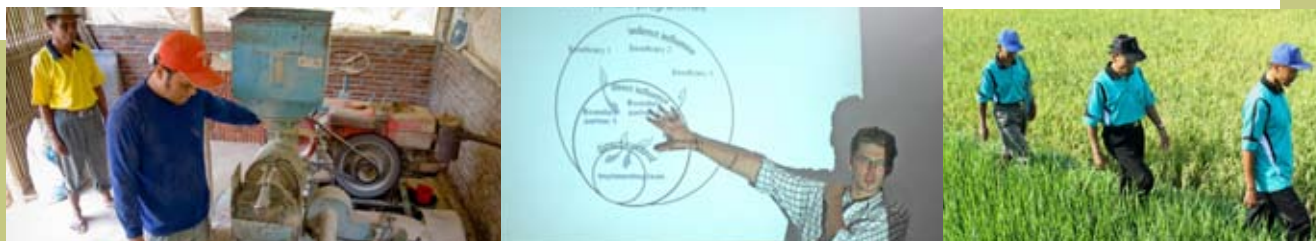
Strong support from management is crucial – both to legitimise and invest resources in the development of the system, and to create the conditions necessary for its implementation. These include the integration of PLA principles and practices as an intrinsic part of the management process and cycle; the inclusion of key PLA activities in the calendar of program activities; and ensuring that the relevant people are given the opportunities, means, and incentives to participate meaningfully in the system.

The process of creating a learning-oriented M&E system takes time. It needs to evolve step by step and it is a collective effort. A clear set of guiding ideas and aspirations needs to be articulated to start with. Beyond designing a program in OM terms, you then need to translate that into an ongoing monitoring practice that works to serve the people, objectives and circumstances of the organisation concerned. This means identifying and creating formal spaces to regularly discuss, reflect on, and analyse the program with team members as well as with partners, in order to facilitate and maintain a better common understanding – and co-ownership – of the program, and make sure all concerned are working together towards the same goals.

Thinking through and linking information needs to specific spaces and times where that information is used, assures that insights from monitoring are used for (re-)planning and decision making. You cannot just assume that ‘learnings’ are going to be used: you have to facilitate and formalise the process to some extent.

Once in motion, the PLA cycle stimulates ongoing questioning, flexibility and responsiveness. The roles of both the partners and of the support strategies carried out by VECO, and their respective contributions to progress toward achievement of the program’s objectives, are continually questioned and reflected upon. This creates a better (and deepening) understanding of the process behind the results already achieved, and to be achieved.

# Outcome Mapping and Partner Relations



OM recognises that people and organisations drive social change processes, and that ‘changes in state’ or impacts on the intended beneficiaries of a development program result from a complex, living web of interactions of diverse actors and forces, rather than from a linear, causal chain of ‘inputs’ controlled by development practitioners and donors.

Thus, OM proposes that we can only control changes in our own behaviours and strategies, in order to contribute to and influence behavioural changes in our ‘boundary partners’ – those whom we directly interact with – but not control or claim ownership of specific impacts (beyond our direct sphere of influence). Accordingly, OM defines the outcomes of a program – and the indicators used to measure progress toward their achievement – mainly in terms of changes in the behaviours of boundary partners. And it encourages constant reflection on the respective roles, responsibilities and relationships of all concerned, in the aim of fostering a two-way accountability often missing from PM&E frameworks oriented toward upward accountability.

How then, does using OM affect the quality of partner relations? For this chapter, both VECO Indonesia program team members and people from VECO boundary partner organisations explored the question of how working with outcome challenges and progress markers has actually affected VECO - partner relations in practice.

## Introducing the new program and planned M&E system to partners

VECO’s partners had minimal involvement in the initial phase of VECO’s learning adventure – beyond receiving a brief overview of plans for the new program at the national partner meeting in August 2007, and then, attending a workshop in November to introduce the generic outcome challenges and progress markers VECO had designed for them to use. It was only in December that they first began to directly explore these new tools in preparing their work plans for the coming year. They generally welcomed the change in approach, although the new terminology was hard to grasp.

How were the partners

involved during the OM

program design phase?

**Imam, advocacy & consumer awareness coordinator:** In August 2007 I co-facilitated the first brief (two-hour) presentation of the new program and planned M&E framework to our partners with Steff. We took care to reassure them that the changes we were making would not disturb our cooperation with them. Then, in November, together with the program team, I facilitated a workshop with representatives of all the partners to discuss and clarify the outcome challenges and progress markers we had developed for them.

**Steff, L&KS advisor:** We started off under pressure of finalising the proposal document for the donor, and the involvement of partners in that first step was rather limited. The program staff developed the outcome challenges and progress markers in the proposal themselves, so the partners did not fully ‘own’ them. This was why we held the workshop in November, to present these to them, saying, ‘These are what we thought would be sensible in your contexts and we would like to cross check these with you.’

**Peni, field coordinator:** At the time it seemed to me to be a flaw, the fact that we were not going to train the partners in OM or oblige them to use it in their own organisations ... Before, partners used the LFA and so did we. Now, we were adopting OM for all levels within our own organisation, but not at the partner level. The partners were free to use their own frameworks for monitoring outside our program ... We did not train them in OM, because we

had such a large number of partners with varying capacities, and we were not confident about having all of them adopt OM. Since we ourselves had just begun with it from zero, we had to concentrate on VECO first. So, what changed in our relations with partners when we adopted OM was not so much due to the partners using OM as to changes in the program itself ...

What was it like to introduce/be introduced to the new concepts and tools?

**Hery, MONEV & learning coordinator:** I remember the first reactions of partners when we used the outcome challenges and progress markers in compiling their plans for 2008: 'Ah! this is how it should be!' Perhaps this was because in the old way of doing things, if they did not produce the planned activities and outputs, it would mean they had failed. Now they could still show progress. This encouraged them to speak more openly with us about their weaknesses.

**Rensi, LAPMAS NGO representative, Manggarai coffee chain:** The new program framework made it easier for us to see the focus of the program. Our roles in the program as local NGOs were spelled out, and what we would be working on was more specific and focused. In the past these aspects were far more general ... Also different was that this time they gave us a set of ready-made progress markers to use, whereas in the past, we had to make up the indicators together.

**Adam, DELSOS NGO representative, Manggarai coffee chain:** We thought that the new markers were more measurable. Before, the indicators were much more general ... for example, increases in farmer income in a certain period. It was hard for us to measure them, since we did not have an adequate database or resources to gather the data. Now we could measure the indicators ourselves.

What, if any challenges came up, and how did you address them?

**Hengky, field coordinator:** The terminology of OM was a bit problematic from the start, for both us and our partners. For example, we had problems linking activities to specific progress markers, since some activities contributed to multiple progress markers. Different people had a different subjective sense of what fitted where, so it was hard to reach consensus. And the terms themselves – such as 'outcome challenge' – were very strange and hard to translate.

**Peni, field coordinator:** It was especially difficult to explain to the partners why the statements under the outcome challenge were in the language of goals, whereas the word for 'outcome' in Indonesian has the same meaning as 'result' ...

**Adam, DELSOS NGO representative, Manggarai coffee chain:** At the beginning the new terms were hard to understand. But they explained to us, for this outcome challenge, our progress markers were like this, for that one they were like that. Based on their explanations, we understood what we had to do.

**Adil, advocacy officer:** My response to this challenge of new terminology is to remember that it is just terminology. I still cannot really explain what 'outcome challenge' means, but I am confident about the underlying ideas. So what I stress with partners is, 'Let's forget the terms.' What's important for us is to make sure we are all on the same page. Aside from that, it is important to note that the partners have their own challenges in dealing with the language of different donors, each with their own requirements – OM for VECO, the LFA for other donors. This makes the partners pragmatic. For them, these new methods and terms are a means, not an end in itself.



## Launching new methods and processes for partner monitoring and reporting

Although the partners' progress markers seemed to make common sense at first, once the time came for mid-year reporting in August 2008, it became apparent that the existing formats for making sense of and reporting on qualitative progress were problematic. This led to the creation of the local partner/chain meetings. Although partners had not explicitly trained in OM or participated in developing the PLA system, they now began enjoying the benefits of both through these learning events. It was here that the OM concepts and tools began making a dramatic difference in the quality of VECO-partner relations.

What problems did the initial reporting formats pose?

How were the problems solved?

**Hery, MONEV & learning coordinator:** When we had first reviewed the progress markers with the partners, it seemed as if the partners understood. But a few months later, when they made their first reports, what they gave us was just a list of activities, for example, corresponding to a few of the progress markers. If activities had not been done to support other progress markers, they explained these were not done because VECO was not supporting them in this or that area. We had to find better ways to communicate, to clarify our respective roles, help them to identify what they needed and wanted, and then, specify how VECO could assist.

**Peni, field coordinator:** Various difficulties came up with the reporting formats we tried out. Some partners found the new formats difficult, particularly those working on objective 1, that is, SADC, because they felt they were involved in important activities that were not covered by the generic progress markers, or that they had no activities corresponding to others. Whereas other partners, especially those working on objective 2, advocacy, found the formats better as a way to describe their work.

**Steff, L&KS advisor:** We had made sure to start off the program with a set of common progress markers everybody was happy about, but we did not invest much effort in substantially changing them ... Our attention instead shifted to a trial and error search for how to best monitor and document changes with respect to the existing progress markers. We'd started by asking partners for reports, and saw that it was almost impossible for them to report on the progress markers because they ended up giving us a list of activities. It was then that we came up with the local partner/chain meetings, which were facilitated to trigger discussions of how partners were progressing with reference to the progress markers, and to look at everyone's roles and the changes they had made in relation to what is going on in their specific chains. The first two sets of meetings proved difficult. Subsequent ones have been increasingly more successful, as the field coordinators have got better at facilitating them.

What effects did the new methods and processes have on VECO - partner relations?

Were all the effects positive or did some of them present a challenge? If so, how did you deal with the challenges?

**Peni, field coordinator:** The significant difference was that before, when we evaluated beneficiary level success [in planning and evaluation meetings with partners], like an increase in rice production from 10 to 15 tonnes, we never stopped to look more deeply at who had played what role in contributing to the change. With OM we began to probe the roles played by the different actors involved in making that increase happen.

**Imam, advocacy & consumer awareness coordinator:** Unlike at the previous planning and evaluation meetings, we had to focus on discussing changes at the partner level, rather than discussing impacts at the farmer level, and to sort out their roles and responsibilities and ours. The challenges were mainly related to the progress markers – confusions of changes in what farmers were doing with changes in what partners were doing. This had to be discussed and unravelled. Everyone was so used to the LFA. The program team had to take a dominant role as facilitators, whereas before we had just been observers.

**Hengky, field coordinator:** When we engaged with the new methodology in the local partner/chain meetings it triggered in us repeated questions about our relationships with our partners and our respective roles in relation to each other, 'What is our role?' ... 'What is your role?' ... 'What new or innovative things will we do this semester?' And this in turn stimulated the partners to really think about their own roles and about what they had to do differently in order to succeed, or in order to scale up their successes in the case of things they were already doing well. Our relations with partners began to be more innovative.

**Endro, LSKBB NGO representative, Boyolali, Java rice chain:** The first thing that changed for us in the new local partner/chain meetings was that discussions were more sharply focused ... By the end of the process, our outcomes for the next six months, and the roles of VECO, our organisation and the farmers were clear. The new way of reporting was easier and more participative. We could directly measure our own progress.

**Rensi, LAPMAS NGO representative, Manggarai, Flores coffee chain:** In the past, our evaluation and planning meetings involved VECO, our NGO, and the farmers we worked with. At the local partner/chain meetings, we invited representatives of our farmers, but the focus was on the roles of all the actors, so the farmers could get a better sense of the overall work being done. We gathered information on our results beforehand and brought them to present at the meeting. The facilitation methods made the discussions very open, inclusive and lively ... Before, we just reported our monitoring results, and that was it, there was no discussion to make sense of the results. Now, monitoring and evaluation involved learning and knowledge sharing at the local level, and led directly into planning. We didn't have to wait for the results.

**Adam, DELSOS NGO representative, Manggarai coffee chain:** Another difference was that the local partner/chain meetings linked us with fellow VECO NGO partners in the same local chain, so we could share knowledge and learning. We could learn from the other NGO's success, and vice versa, and we could give each other input in areas where one had failed but the other had succeeded ... It was also easier for us to gather the information we needed from the farmers, because what we were asking them was to give us was their own assessment of their own progress in applying new practices or in making changes that we were helping them with.

**Peni, field coordinator:** Another important change that affected relations with partners was that we were interacting with all kinds of other actors related to the commodity chains, including government and private sector actors, traders, processors, and other [non-VECO] NGOs. My own web of relationships became much broader, which excited me. We also invited these actors to join discussions we led in the new local partner/chain meetings, and the discussion results directly entered our OM monitoring formats. And when problems were raised at a meeting, for example, that farmers in a certain village were having a hard time getting a decent price, we could directly consult the private sector actors present, and get immediate responses that could help solve the problems or point to practical solutions at the local level.

## Continuing local meetings, strengthening partner relationships

In 2009, VECO implemented the first complete PLA cycle. The bi-annual local partner/chain meetings were an essential part of the cycle, and continued to strengthen PLA processes, including the use of outcome challenges and progress markers, with partners. Additionally, VECO took on farmer organisations as boundary partners for the first time, and established field antennae in the districts. These two innovations facilitated much closer access to both NGOs and farmers. At the same time, they added a new level of complexity to the program, and the roles and relations of the field coordinators and NGOs within it.

What changes did the implementation of the full OM/PLA system bring to VECO-partner relations in 2009?

What other key changes affected partner relations in this period?

**Hery, MONEV & learning coordinator:** In 2009, we established field antennae in Flores, Sulawesi and Java (as planned following the OCA) ... We also started **working with farmer organisations as boundary partners, since the goal of the program is to work to strengthen farmer organisations to improve their positions in the agricultural chain ... In this context, the role of the partner NGOs is to act as service providers to the farmer organisations. So we had a double role: first, to work on strengthening the positions of farmer in the chain in cooperation with the NGOs, and second, to encourage and build the capacity of the NGOs to become service providers. Our relationships with our partners and our roles in the program became more complex.**

**Slamet, finance manager:** Before I came to work at VECO in February 2009, my job as a finance person was mainly a desk job, and rarely involved in depth relations with partners. But I began working directly with VECO's partners as part of linking finance into the PLA system, and continued to visit them periodically as needed, to discuss with them how to use their funds to make the program run better, to improve their self funding arrangements, and to address challenges, like overspending, underspending, or unaccounted for expenditures.

**Rensi, LAPMAS NGO representative, Manggarai, Flores coffee chain:** In 2009, the roles of the VECO staff really changed. Before, they had given us training, but now they were more attentive to us. They worked with us closely to better understand what we really needed. They encouraged us to become more creative in finding ways to move towards the results we wanted to attain.

By the end of the year, the farmers we worked with as boundary partners had a good shared understanding of the program and how to monitor progress for our six-monthly evaluations, making it easy for us to identify what steps we had to take to reach our targets for the next six months. Our increased clarity also enabled us to more easily apply the more general ideas explored in national partner meetings to address our weaknesses ...

**Adam, DELSOS NGO representative, Manggarai, Flores coffee chain:** In a word, everything was clearer. If we found that we had not made much headway in the previous period on a certain progress marker, we gave more emphasis to ways to improve our results in that area in the following period. There were some modifications in the format VECO gave us for our proposals for 2010, but all of them made sense. There was a smooth continuity between our evaluations with farmers, their discussion in the local partner/chain meeting in November, and the annual plans we made in December.

We also felt a stronger emotional connection with VECO staff. Before, they only came occasionally to do monitoring as a routine thing. Now they were based in our area, so we had closer access to them ... Cooperation with fellow NGOs in the same district also kept getting closer due to the local partner/chain meetings. Beyond the meetings, we and the farmers all had more access to and interaction with other actors in our local chain.

**Endro, LSKBB NGO representative, Boyolali, Java rice chain:** Our relations with VECO became smoother because we had a clearer understanding of our outcomes, which we felt we shared with VECO. We could more quickly contact the field coordinator and get a more immediate response to problems because of the new field antennae ... The focus on behaviour change made more sense to us. The challenge was that in reporting on our progress, many of our activities applied to more than one progress marker, so we still debated about how to categorise them. But the reports were far easier to make, unlike reports using the LFA, which had long narratives to explain problems and solutions. In the OM reports we describe the key results of our activities and our learning. Then we directly use lessons learned to help us determine plans for the next period.

For example, in 2009 our organic rice cultivation plots were not producing optimal results because they were being polluted by non-organic cultivation fields in the vicinity. Our plan for 2010 was to create organic-only zones covering three sub-districts, with the endorsement of local government. This will make it easier for us to control inputs and carry out our organic rice program.

## Partner participation in designing the new program framework

In 2010, VECO's boundary partners have actively participated in the design of the chain intervention framework (CIF) for phase 2 of the program in 2011-13, including the crafting of their own outcome challenges and progress markers. This appears to be having a profound effect on their relations with VECO, in terms of their sense of shared ownership of the program, clarity about their roles, and motivation to participate in making it happen.

What new changes have come in terms of using outcome challenges and progress markers this year?

How have these changes affected VECO - partner relations?

**Rogier, country representative:** Our partners have become more involved in the planning of the new program. At the beginning we had to design the new framework quickly and only consulted them on a limited scale. But this time we consulted with them intensively as part of designing the new chain intervention framework (CIF) for the 2011-13 program, and all partners have designed their own outcome challenges and progress markers. It remains to be seen how this will affect partner relations during the next phase of the program. But at the national partner meeting this month, it was evident that the partners know what they are going to do and what role they are going to play, and that their sense of ownership of the VECO program is much higher than before.

**Steff, L&KS advisor:** The progress markers for the CIF are tailored to each specific partner organisation, based on the results we want to achieve in their local chain, whereas before we had a common set of progress markers for each type of organisation in each type of commodity chain. This time, this has been done in a fully participatory way, with each organisation figuring out what role they will play, in relation to their mandate and level of capacity as an organisation, and also, to changes they want to see in their own organisation in the future. The consequence for the PLA system is that the progress markers from one organisation to another are no longer comparable ... Yet, I think now their monitoring of the progress markers will make even more sense to them, and that unpacking roles and responsibilities in this way will promote greater understanding and clarity between us and our partners, and sharpen our awareness of the limitations of the support roles we can play ...

**Endro, LKSBB NGO representative, Boyolali, Java rice chain:** We had a big meeting involving VECO, our NGO and APPOLI (the farmer organisation we work with in our district), to identify what results we want to achieve in chain development in the coming two years, and to clarify what each of us will do to contribute. Based on mapping the strengths of each actor, our roles are clear, and we all have a much stronger commitment to the program.

**Rensi, LAPMAS and Adam, DELSOS NGO representatives, Manggarai, Flores coffee chain:** Our program planning meeting with VECO in May also had interesting implications for our futures as organisations. Our discussions led us to consider: what kinds of future relations do we want to create with VECO and/or with the farmer organisations, and they with us, based on what we can offer one another? What strategies can support our future autonomy and that of the farmer organisations? We are learning to see partnership in a new light: our relations with VECO as our donor and with the farmers as beneficiaries are not meant to be 'marriages for life'. If we mobilise our creativity with our partners, then perhaps one day we can be as big as VECO. Linked to this, we identified our need to develop our own database or information system. We still depend on VECO to identify opportunities, to distinguish whether something is a problem or a need, to process our data for us. We want VECO to help us develop a software system to let us monitor and evaluate our progress in the field on our own.

## Partner relations: the big picture

Overall, VECO program team - partner relationships, and their respective roles in the program, have improved in a variety of ways, big and small, over the past three years as a result of adopting OM. Even partners who have only very recently begun to partner with VECO are keenly aware of the positive effects of VECO's way of setting outcomes and monitoring progress, and more generally, its way working with them, and the opportunities for shared learning, open communication and mutual care and respect that this fosters.

Looking back to the beginning,  
when VECO first adopted OM,  
what overall effects has this had on  
VECO - partner relations?  
  
How have your roles changed,  
and what are the benefits and the  
challenges involved, now and in  
the future?

**Steff, L&KS advisor:** In the past we defined the program together with partners, but if you look at the report formats from five years ago, it sometimes appears as if we (VECO) were doing exactly the same thing as our partners. Today it is much clearer what the roles of the partners are as distinguished from the role of VECO. The program staff also have different roles than before, as facilitators. People do not always feel more comfortable with explicitly defined roles and responsibilities; having our progress monitored tends to make us feel more vulnerable. Discussions focused on 'how did you change, what did you do to make it happen; how would you need to change what you are doing to make it happen' are very different than discussions on 'what activities did you do this year.' It can be much more confrontational if it is not handled with care. A crucial aspect of the future of the PLA system will be to make continuous efforts to make the system work with the partners, and to assist them to develop their own learning and knowledge sharing systems.

**Endro, LSKBB NGO representative, Boyolali, Java rice chain:** Aside from using outcome challenges and progress markers in the VECO program, we have also started using the whole OM model ourselves, including the mission and vision, strategies, outcome challenges and progress markers for monitoring and reporting. We feel it is more effective and efficient, and helps us to be more accountable.

We also feel a responsibility to share our experience with other people about models and methods that are more appropriate for our reality. This model is more appropriate for us than, for example, the local government's approach, in which problems are the point of departure. They make 'projects' to deal with problems that farmers face, and once the projects are over there is no follow-up.

With OM we don't start with the problem. We make a continuing program. If there is a water shortage, we can do various kinds of projects to fix that. But we start with the dream, 'When I have enough water to irrigate my crops, I will have good harvests and then I can buy some cows ...' I facilitate training for other groups of rice farmers in our district. Three months ago I began introducing OM to groups who have got grants to start using organic fertilisers under the government PNPM Mandiri (National autonomous community empowerment program). So OM is not only affecting our relations with VECO, but also our relations with many other people.

**Rogier, country representative:** Overall, I think that our relationships were good before, but they have been somewhat strengthened by the OM approach. The local partner/chain meetings, which we have now been holding for two years, have made a big contribution in this respect, because they give the partners an opportunity to participate in monitoring and analysing what we are doing in the contexts most relevant to them. They give their contributions and we take these contributions seriously, reflecting on them and using them to plan improvements to the program.

So, planning, learning and accountability have begun to extend to the partner level, even though we have not literally implemented the whole OM/PLA system or given training in OM for our partner organisations. Some of our partners, especially those who have been with us for a long time, are now asking us to help them to design learning systems for themselves, so they too can be learning organisations. This will be one of the challenges to meet in coming years.

**Alfons, program manager/SACD coordinator:** I think the use of outcome challenges and progress markers has mainly affected clearer roles in our relations with the NGOs we work with, especially those that are more advanced, and have learned faster how to use these concepts; whereas others in less developed areas of Eastern Indonesia have found the terms confusing.

I think the ability of our partners to work with the OM concepts might become weaker in the future as we move from having mainly NGO partners who can read and write and use a computer, to increasingly more farmer organisations consisting of people who are sometimes illiterate and have no knowledge of the language of NGOs. Similarly, the private sector organisations we deal with do not want to have anything to do with terms like OM. We will need to further simplify our language for use with farmers and other non-NGO partners, who basically want to talk in terms of volumes and production yields and money.

The local partner/chain meetings create a good dynamic for us to discuss things with partners and provide an opportunity for them to network with many other stakeholders in their chains. But I don't think that the use of elements of the OM framework changes VECO's relationships with partners in any significant way. Like most things in life, the relationship is about money. We are their donor, and they will comply with any framework we ask them to adopt. Similarly, it was when we decided and announced that we wanted to partner with and fund farmer organisations that the farmers formed organisations so they could qualify.

**Slamet, Finance manager:** We strive to build a strong shared sense of accountability with our partners. The challenges are that they often have low capacity to begin with, and their staffs often change, so the new people do not yet understand these things. Perhaps even more challenging is that in the future, we will be partnering with many more newly formed farmer organisations ... It will be important to find effective ways to build shared understanding and commitment, first of all, about their accountability to us and all their members. Only then can we go on to give finance training.

**Peni, field coordinator:** For me, the partners are now more transparent because of the OM framework we use, not just in the sense of finances, but in the sense of information. Now they tell us about all their activities with other parties – whether government, private sector, or village people – not just about a fixed set of activities listed in a program plan, as when we previously used the logical framework. This helps me because of the limited staff I have in my region. Now the partners bring me information, rather than me having to go looking for the information.

**Hengky, field coordinator:** From my perspective, our relationships with partners in general are no different than before, except at certain times, when we go to them to focus on monitoring the program. Here, the OM tools makes a big difference. We are always asking them questions about what they are doing to find out what is the same and what is different. This triggers them to be more innovative and creative in achieving success.

If you have only just started to work or to partner with VECO, how do you feel that VECO's ways of setting outcomes and monitoring progress affect partnership relations?

**Tonny, field coordinator:** I have only been with VECO for 10 months, but I am concerned that some partners who are new and only have experience working with VECO's current program using OM, may be making choices and learning ways of planning and developing a project or program that could limit their ability to attract support from others donors in the future ... We need to be mindful about the effect we are having on them because of the tools and language we use to frame our relations ... especially if we are working with them only for a short time.

**Edi, APKT FO representative, Toraja, Sulawesi coffee chain:** I am a coffee farmer from Toraja. Until 2006 I worked alone, doing everything from planting to packaging. It was hard to make a living. When I became the head of my village, I formed a group of coffee farmers and we found a local NGO to help us move forward. The NGO was a partner of VECO Indonesia, so we have known VECO since then. The VECO field coordinator worked with us to help us improve our production and processing practices, encouraged us to join in discussions and learn about management. We felt that the VECO people were our family. Before VECO changed its program in 2008, we did not know anything about their program. We did not know what we should do – we just did whatever they told us. When they explained the new program about the whole coffee chain in Toraja, we gained a bigger understanding. We began to understand what happens to the coffee we grow after we sell it, which we did not really know before. We learned how to calculate our production yields, improve the quality of our products, and began to focus on how our group could become more autonomous, and do things differently so we could improve our incomes and save money for our children's education. We also began to connect directly with organisations and companies involved in processing and marketing Torajan coffee for export.

Since we became a direct partner of VECO in 2010, we have started to learn how to make our own plans for what we will do in the next program. The terms and formats they use are sometimes easy, sometimes hard, but when we don't understand we just ask. The best challenge of all for me has been learning how to make finance administration reports. I used to avoid that as much as possible by getting the local NGO to do it for us. But when we became a VECO partner, we were obliged to report on the funds we got. The finance people from VECO worked with us, and I finally could do it and understand the purpose; I was surprised to find out how useful it was to do. This taught me that we can learn anything!

**Susatyo, APPOLI FO representative, Boyolali, Java rice chain:** Our farmer organisation was established in 2007, with the assistance of LSKBB – VECO's partner in our district, so we have been indirectly linked to VECO since then. This year we became a direct partner of VECO. Our relations are of course much closer now. In the past we were familiar with the LFA. We find that the new program planning model is easier for the farmers in our organisation to accept. The farmers can more immediately experience, measure and enjoy the results of the program. For example, the guidance we receive includes training and then the direct application of what we have learned. The training is not the end point. The VECO people work directly with us and we can immediately test the results. We begin monitoring right away, and the participants are enthusiastic about it and interested in finding out and evaluating their results.

**Eveready, JALESA NGO, Toraja, Sulawesi coffee chain:** My NGO has been a partner to VECO since 2005, but I only assumed my position there in late 2009. My previous experience was in the hotel business, so I was totally unfamiliar with the NGO world. From what I can see, one of the major effects of VECO's system is how enthusiastic the farmers [from the VECO partner farmer organisation] are about attending meetings, which truly amazed me at first. The documentation is also useful to them, their group dynamics are well developed, and the tools the VECO facilitator uses really expedite the discussion process. In the relations between VECO and my NGO, the partner capacity-building part of the program has been very significant in helping me improve staff performance, and the PM&E processes every six months have helped to make our operations more systematic. I have never before experienced a set of methods as sustainable as these.

**Adil, advocacy officer:** I think that these OM tools call for deeper and more intensive interactions in our relations with partners, in which we give each other feedback, since VECO and each partner have differing, yet mutually strengthening roles in working toward a shared goal. Our strategy maps demand that we interact directly and repeatedly with our partners to achieve the goals of the program. This is quite different from the effect on partner relations created in using the LFA.

**Tonny, field coordinator:** Even without me supervising or monitoring their activities, the OM/PLA system and tools in themselves predispose the partners to be more creative in their activities, because they focus attention on small innovations and changes in what they are doing or how they are doing it.

## Core team reflections



The explicit use of OM with the partners, although limited to progress markers and outcome challenges, has had some effect on partner relations, in that it demands more clarity about the roles of the partners involved, ongoing reflection on how each is contributing to progress toward shared outcomes, and a focus on innovation.

Ideally, in time, it can also contribute to relationships in which partners are more accountable to one another and more equal collaborators, and to more selective choices of partners. It should be borne in mind, however, that many other factors determine the quality of partner relations, especially regarding accountability.

Initially, we did not involve partners in the design of the program, and this led to some difficulties. For the 2011-13 we have involved them much more fully in developing their own outcome challenges and progress markers. and used their input to focus the program more sharply on priority issues and desired results in their own local chains. The PLA system is an important vehicle for fostering learning together with partners. Continuous negotiation and dialogue about program activities, strategies, and interventions with partners and farmers during the local partner / chain meetings assist in creating a healthier downward accountability process. Partners have also absorbed many of the core principles and processes of OM through learning by doing in these events (rather than as a result of explicit training in OM).

Outside of their work on their own progress markers and outcome challenges with VECO, the partners remain free to follow their own PM&E systems. This is fine, except that we rely heavily on the quality of their monitoring input on the context, impact-level changes and tangible results of the agriculture chains, and this could and will be improved in the future with VECO's support. A few of the partner organisations have independently adopted more aspects of OM and use the OM formats developed at VECO in their other partnerships and work. A few are beginning to ask VECO to help them develop a learning and monitoring system like ours. Still others do not draw a distinction between the monitoring methodology and content of the program, which they perceive as one package.

Given the varying capacities and needs of the partner organisations, the complexity of putting our own OM/PLA system into practice, and the difficulties many partners have had with the limited OM terminology we did use with them, we do not think that it is the most appropriate system to improve partners' monitoring capacity, and as a development NGO, we would hesitate to impose our own methodology on our partners. Rather, what would be more useful and effective in the future is to conduct an analysis of the same basic questions at their level: what information is needed, when is it needed, for whom and for what purpose? Based on that, VECO can support the partners in developing their own learning and monitoring systems, which are likely to differ from one partner to the other.

# Outcome Mapping and Visions of PM&E

OM is often presented, not just as an alternative method of PM&E, but as an alternative mindset – regarding not only the role of planning, monitoring and evaluation in development work, but also, the very nature or purpose of development, and the results and sphere of influence of a development organisation or program.

To conclude the VECO learning history, participants looked back to the beginning and reflected on how their vision of these elements in particular, and PM&E in general, has changed since they first adopted OM. Then, they shared their current perspectives on how working with OM is different to working with the LFA, now that they have had some experience in working with both approaches.

## Looking back, looking ahead: changing visions of PM&E

How has your vision of PM&E in general, and of the nature or purpose, results and sphere of influence of the organisation, in particular, changed as a result of using OM over the past three years?

**Imam, advocacy & consumer awareness coordinator:** The reason we wanted to use OM and develop a PLA system was that we didn't want to keep repeating our past mistakes, in focusing on figures rather than human behaviours, even though changing behaviour was the key to our work, and the key to reaching our development goals. OM deeply resonated with our vision of what development is for.

When I was first introduced to OM I was reminded of a workshop on results-based management I attended in 1998, where the facilitator told us, 'You are making a big mistake because you are trying to control things beyond your capacity and beyond your right.' I argued with him at the time but now I know he was right. The big change brought by using OM as our tool was that it changed our vision of our program. It did so by focusing our attention and discussions on interventions to promote behaviour change in ourselves and in our boundary partners. It also limited our area of responsibility and control to that level – whereas before we used to try to control everything (and failed).

**Hery, MONEV & learning coordinator:** The biggest change I think, is that before, M&E was not integrated, but something mechanical. We envisioned it as something extra we had to do, besides our 'real' work. Now we see it as an integral and highly practical part of our work. Using OM has changed how I think about the farmers our program aims to benefit. Many other factors influence the impacts at this level, and in the past, we designed many interventions to have an impact but there was no change – it was like looking into a black box. Now we are more aware of our limitations – regarding what our interventions can achieve, and what we can control. With a more clear and focused vision of these elements, we can make interventions that are more effective in achieving our outcomes.

**Adil, advocacy officer:** The OM approach has made me wiser. Now I see that development is about the small changes people make. And monitoring is about paying attention to these small changes. Now, I appreciate the small changes more. When a program achieves small changes now I see that as a success, rather than as a failure. Development also involves many different actors. I am now more aware that I am only one of many actors out there. I often find it offensive when I hear organisations promoting themselves by claiming they have achieved all sorts of changes that were actually made by the small contributions of many other actors. The narrowing of focus in OM to the partner level makes us more mindful and honest about the degree of influence or control we can actually have.

**Hengky, field coordinator:** The first crucial thing I learned from OM is about how we see change, what makes change happen. OM shows us that the only thing we can measure is changes in people's behaviour, not changes in state. Secondly, OM shows us that the facts are not simple, but complex. Defining outcome challenges supports us in determining how far we can realistically affect change. OM teaches us that we cannot really affect change at the impact level, only at the level of our partners. The world is complex, and we cannot claim sole responsibility for changes in state.

**Peni, field coordinator:** My vision of monitoring is more human, less mechanical. We need to really listen to what people are saying, thinking and feeling; the process is much more people-centred. Before, I used to visit the farmers and ask them questions just so I could record the numbers of dead plants or trees. We were just counting, how many dead ones, how many living? How many farmers are planting them? Now we are paying attention to the relationships between different actors in the program, and monitoring their roles and their contributions to change, including my own role as a member of VECO. As a human being, it is easier for me to monitor human behaviour.

**Rogier, country representative:** My vision has changed in that it is easier for me now to see the limits of what you can do with a development program and what you can do with NGOs. Because with OM you have to make very concrete what your own role and capacities are, and also, those of your partners. My vision of development has changed in that I am much more aware of what we, as development actors ... can do. In other words, my vision of development is more framed by the question, 'Who can contribute what to development?'

Using OM makes it clear that NGOs are not just 'buckets' into which you can pour resources, and then see something nice coming out. That is a bit exaggerated, but this is the way we used to work: identify an NGO that was working with farmers in a certain area, and then support them, do some organisational/institutional development with them, invite them to join workshops, and expect good results to come out.

Now we start by specifying what we want to change at the farmer level, and then we work as a program team, together with our partners, who we see more as service providers, to direct our combined efforts to make those changes. Another thing is that OM makes you much more conscious of development as a process and provides a solid analytical tool to let you keep track of the process. My vision of PM&E, and those of my colleagues in this program, has changed in that we see monitoring as much more than accountability to a donor ... Now I see planning and learning and accountability as one integrated package that is integral to our work.

**Alfons, program manager/SACD coordinator:** OM seemed, when I first heard about it, to be a more natural and practical way to monitor change, compared to the LFA, where I always had felt that qualitative aspects of what we were doing were missing. But it has not changed my vision of what monitoring is, or what development is, or what the sphere of influence or results of a development organisation are. For me, the ultimate thing is increasing the farmers' incomes. I do not care how you get to that, what tools you use to monitor it, as long as the farmers get more money.

**Steff, L&KS advisor:** I think that when I first introduced OM to VECO, people experienced a shift in awareness to the effect that 'things can be different' – after long using a more control-oriented model of M&E, consisting of a 'game' where the partners produce reports to VECO and VECO produces reports to the donor, and then you are done with it till the next year. When you first present OM it is the principles of it that are so touching to people.

I think that in the first year, people had an awareness that things could be different, but not a change in vision. When we began the program in 2008 the main emphasis was on accountability and report writing to justify all the things we had put down on paper, and there was perhaps a fear that while we had sold a new idea on paper, there might be no real change in practice.

If you jump to the present, most of the people at VECO Indonesia are convinced that since we have invested so much in building the PM&E system, we may as well learn from it, and use what we learn to change the program. Donor reporting still must be done but it is no longer the most important thing in the system. There has been a radical change in people's perceptions of why we are doing it. And having a name for what we do helps, because it clarifies the purpose of participatory M&E and the reason for having a PLA system in the Indonesian system.

The 'sphere of influence' is still a bit tricky, because although we are all convinced of the idea, in the end there is a constant dialogue about what the boldest boundary of the sphere of influence is. We have created the chain intervention framework in response to the realisation that it is not enough to monitor changes only in your sphere of influence. You also need to reach to the level beyond that, in order to make a program happen, as well as to account for what you are doing to donors. In relation to this, there is a general perception of the sphere of influence as the boundary between the field where VECO can influence change and a field that is beyond our

capacity, where we are just one of many other players. The concept of the sphere of influence has made it clear that if we intervene here, we'll most likely have a change, but beyond that, we are not alone anymore.

VECO's vision of its purpose is definitely different. Compared to when I first came in 2006, there is a more modest way of planning the program. If there is one thing that OM has helped across the organisation it is to provide language and insights regarding things that people have felt for a long time and now they have words for it. The global investment in taking on a new framework and PM&E system has resulted in a changed vision across the organisation that we are taking ourselves seriously as a learning organisation.

## Looking back, looking ahead: OM v.s. the LFA

What changes did the implementation of the full OM/PLA system bring to VECO-partner relations in 2009?

What other key changes affected partner relations in this period?

**Imam, advocacy & consumer awareness coordinator:** When we worked using the LFA, the boundaries of our sphere of control were unclear, as were the distinctions between the partner and beneficiary levels of interventions, and between impacts and outcomes. With OM these things became clear. OM has enabled us to develop a simpler program management and reporting process, even though the program itself has become more complex. The OM-based proposals and reports are much easier for our partners to manage. The advantage of the LFA is that it gives you a logical way to think about progress. The disadvantage is that it brings about less learning about how progress actually occurs. Yet if you didn't first understand how to develop a program using this kind of logic, I think it would be difficult to understand the OM model and its terminology. The main advantage of continuing to use the LFA is that it meets the demands of our donor.

**Adil, advocacy officer:** My OM experience is very limited as I only began working here this year. But I knew the LFA from my former job. In the brief time I've been here, I've gained something extremely important. In using the LFA I always formulated advocacy goals in terms of changes in policy or in the policy-making process. Based on my experience with OM, I've learned that such goals are unrealistic. VECO is not the only actor, but one among many in the policy change context. Based on OM, my focus is now on our partner organisations. I feel this is highly significant, because I see now that we can influence changes in partners within the policy change process, but not changes in the policies themselves. That's what I've learned. So the outcome challenge is for partners to become well recognised and accepted by the other stakeholders. Now, the 'small changes' in this direction count as successes.

**Hery, MONEV & learning coordinator:** I think that the relative advantages of OM versus LFA are still debatable. You cannot just use one single approach or tool. It is about adding, not taking away. Although we have adopted OM, we still use many other older approaches and techniques, such as PRA, for example, and we have not thrown away the LFA. We are mixing OM with elements of the LFA in our new program. Although we are not intervening at the beneficiary level we are getting more information at that level using LFA-type indicators. Monitoring in the next program will tell us both kinds of information.

**Rogier, country representative:** Some donors require us to deliver figures about production, income and prices, which are very tied to the log-frames for the programs we propose to them. We keep track of such indicators for our accountability to these donors, and to communicate with the outside world about what we do. Yet we also need impact-level indicators for program purposes, which we would not get from a strictly OM approach, and we have linked these into the design of our new program. These indicators will only be measured initially and after three years, so they do not form part of the OM-based monitoring that we do year round.

The process we have undertaken is complex: introducing OM, developing a PLA system, and doing PM&E based on OM and PLA principles. This is something you can only do with the help of a very good facilitator and a substantial investment of time, resources and commitment. I say this based on seeing how much farther we have come

compared to our colleagues in nine other VECO offices around the world, who did not have a full-time expert available or invest as many resources to make it happen. This is all to say that it is not enough to just do a training in OM to learn how to work with it effectively. In contrast, anyone can work with the LFA with minimal training.

**Slamet, Finance manager:** To me, the main difference between the two approaches is that the LFA mainly deals with activities and outputs and uses quantitative indicators, whereas OM deals with the qualitative results that the activities and outputs bring, and what contribution these results make to achieving the goals of the program. LFA is easier to use. OM takes more competence, creativity and energy.

In my experience in INGOs that worked using the LFA, all activities had to be carried out as planned, whether they benefited the beneficiaries or not. Activities and budgets were often replicated year after year whether or not they brought results. In this context, the finance job was limited to managing the money, and did not involve much interaction with the program. M&E for finance was limited to ensuring and verifying that money was spent on the activities as planned.

But in working with OM, we all need to focus on results. When things change among the partners or beneficiary community, we must be able to change our interventions too. The OM approach challenges us to be more proactive in finding new solutions to improve the results end-users receive. Here, the role of finance is focused on how the organisations involved can improve financial accountability. This not only involves looking at figures but also, understanding the activities and their purpose and what is happening in the field, and being innovative and creative and working closely with other staff and partners to make the activities contribute more effectively to the program's ultimate goals.

OM requires a high level of capacity in the staff and strong direction, since the program is flexible and can change very fast. In this context, M&E is an essential tool to keep track of the changes, to inform the next steps we take toward the long-term goal. We have to exercise more control and care.

**Alfons, program manager/SACD coordinator:** The LFA is easy to use but only focuses on quantity, without contextual information. OM addresses the qualitative and contextual aspects ... It permits us to be more flexible, to adjust a program plan if it is not bringing results. And that is how I think things should be. But the drawback of OM is that it is a complicated way of monitoring. ... It is attractive, in theory, but in practice requires a lot of competence. If people use it without knowing what they are doing, the results will be unreliable ... Building capacity to use it consumes a lot of resources, and when you put money into M&E you cannot give that money to the farmers. Optimally, I would like to see a combination of the two, and I think our new CIF is a step in the right direction.

**Hengky, field coordinator:** I think that in our programme for 2011-13, we are combining both approaches, in order to avoid the weaknesses or limitations of either one. OM is focused on the partner and outcome level, whereas the LFA focuses on the beneficiary and impact level. Combining information from both levels makes things clearer.

**Steff, L&KS advisor:** I remember one time we were presenting OM to some partners. One of them said to me, first you bombard us for 20 years with a tool that doesn't make sense to us, then you steal our concept that 'development is about relationships' and give it a nice name, and now you are teaching us about it. The bottom line is that reporting using OM or reporting using LFA is just a matter of what framework you have used to describe a program, and at this level it is possible to 'translate' our OM program into the language of the LFA.

Yet the OM/PLA system is much more than a format for reporting. It is a way of organising ourselves ... What makes OM different are the values and principles that underpin it. Using the LFA is about filling boxes, a way to describe a program as a set of outputs and results, without an explicit focus on the actors involved. OM goes much deeper. There is a whole philosophy and way of doing things underlying it, from interacting with partners, to understanding the process of change, to fostering change based on what is actually happening at the time, and, based on the actual people involved – by making clear who is doing what, and who is changing and in what way.

## Core team reflections

Individual visions vary, but there seems to be a consensus that OM leads to a humbler vision of the purpose of a development organisation, its sphere of control, and the results it can achieve, because it focuses in on changes in behaviour and relationships among one's boundary partners, and is underpinned by the principle that you cannot change other people, only influence them or give them resources to change.

Clearly, OM also invites a broader and bolder vision of the role and purpose of monitoring and evaluation in development work, because participatory monitoring, sense-making, evaluation and planning are central to ensuring the ongoing effectiveness of development interventions in the complex world of human beings.

At a certain level, the LFA and OM approach may perhaps be complementary, if their combination is carefully approached and time is taken to explore and foresee the consequences. We have not yet taken the time to thoroughly examine that complementarity, but it seems that the question of how and whether the two approaches can fruitfully 'share the same space' is worthy of further discussion.

In adopting OM as our guiding framework within the organisation, we have had to accommodate the need to 'translate' our program into the language of the LFA to maintain accountability to donors and to the public. We have also 'rediscovered' the value of quantitative indicators to track changes in the sphere beyond our control – since changes in this sphere are the ultimate reason why we do the work that we do.

This is reflected in the unique way we have incorporated chain results and indicators into our current program framework. However, while it is true that the framework contains elements that would be 'at home' in the LFA, the core principles of OM continue to strongly inspire and resonate with our approach to program planning and management, our identity as a learning organisation, our ways of relating to our partners and beneficiaries, and our vision of developmental change.





# Acronyms

**CIF** Chain intervention framework

**FO** Farmers' organisation

**LEISA** Low external input sustainable agriculture

**LFA** Logical framework approach

**LIMS** Learning & information management section

**NGO** Non-governmental organisation

**OCA** Organisational capacity assessment

**OM** Outcome mapping

**PLA** Planning, learning and accountability

**PM&E** Planning, monitoring and evaluation

**SA** Sustainable agriculture

**SACD** Sustainable agriculture chain development

**VE** Vredeseilanden

**VECO** Vredeseilanden country office

**VECO Indonesia** Vredeseilanden country office in Indonesia

In the quotations in the learning history, all references to VECO should be taken to mean VECO Indonesia unless otherwise stated.



## VECO Indonesia : A learning history