TELEV.DOSCOPE

model of planning
monitoring
evaluation
and learning

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PRESENTATION:

The Fondo Centroamericano de Mujeres (Central American Women’s Fund – FCAM) from its beginnings has sought for new proposals, approaches and innovation in working towards social justice. In 2009, the staff and Board of Directors of FCAM decided to embark on a new experience: evaluate the 10 years of work of the Fund using alternative methodologies and approaches that would allow us to learn and strengthen from the experience gained, and in accordance with the social change we want to achieve.

Through the participation in different spaces related to human rights issues and philanthropy, it became evident the need to create new models of evaluation and work on concrete case studies –like this document – that reflect in a better way the mission and vision of our organization, and how social change is understood. The FCAM gathered a diverse group of experts and investigators/evaluators to join us in designing and implementing an impact evaluation that combines participative, systemic and feminist approaches in a complex context and is, as in every innovation, a bit unpredictable.

We appreciate the valuable contributions and commitment shown by our allies in this adventure:

▸ To Natalia Ortiz, for her courage to accept the challenge of designing the impact evaluation component and its tools, as well as for accompanying the team of external evaluators and FCAM team members during the implementation of this component. For her creativity, patience, and resilience in this process of action-learning.

▸ To Camilo Antilión, Martha Jaén and Angie Largaespada for their willingness to take on the challenge of co-designing and implementing the impact evaluation component.

▸ To Virginia Lacayo y Ana Criquillion, for the ability to innovate, being models of the type of interactions that we promote, and for their leadership in the promotion of new paradigms related to social change, systems of impact evaluation, and north-south relationships.

We aim this document will not only enrich the Fondo Centroamericano de Mujeres, but will contribute to other Women’s Funds and allied foundations, as well to other people and institutions interested on these subjects.
ABOUT THE AUTHOR:

Virginia Lacayo has almost two decades of experience in the field of communication for social and organizational change, strengthening social movements, and systemic leadership.

She received both her Masters and Doctorate in Communication for Social Change at the University of Ohio, United States. Her experience, professional approach, and research agenda focuses on innovative approaches and the application of the principles and ideas of the Science of Complexity to the design, implementation, and evaluation of communication strategies for social and organizational change, the strengthening of social movements, and systemic leadership and management. These have been the topics of her most recent publications, presentations, consultancies, and seminars.
THE TELEIDOSCOPE

The teleidoscope is a type of kaleidoscope, which is a device composed of an internal system of lenses arranged like a prism that reflect patterns formed by the interaction of diverse objects. However, unlike the kaleidoscope that contains its own visual objects (seeds, flowers, fragments of colored lenses, etc.), the teleidoscope uses a transparent lens on one end to capture images outside of it, allowing us to observe new patterns in everything that we see through its lens.
The purpose of this document is to describe and systematize the implementation of the planning, monitoring, evaluation, and learning model designed by the Fondo Centroamericano de Mujeres (FCAM - Central American Women’s Fund) and a team of supporting consultants. The ultimate goal was to create a permanent and evolving system of evaluation-learning-action that responds to FCAM’s feminist and systematic social change perspective, as well as the unique characteristics of women’s funds that are not always reflected in the dominant impact evaluation methodologies.

FCAM’s P, M, E, & L teleidoscope model is made up of three main components: 1) Formative Research, 2) Impact Monitoring and Evaluation, and 3) Knowledge Creation and Management. These three components should work together in a synergetic way from a systemic point of view to identify behavior patterns in the system that are not otherwise observable in isolation, and also to respond to questions no addressed by other methodologies and existing evaluation models.

This systematization of the FCAM P, M, E, & L teleidoscope model represents a contribution to the collective, internal, and global discussions about the conceptualization of social change, the role of women’s funds in these processes, and how to evaluate the impact of the funds in an effective, constructive, opportune, and adequate way that consider the characteristics of a fund’s work and that of its respective contexts.

We hope that this experience and the resulting planning, monitoring, evaluation, and learning model, peaks your curiosity and stimulates a search for new forms of planning and evaluation that respond in the most effective way to the systemic nature of the social change processes that we promote.
Thomas S. Kuhn, who wrote “The structure of the scientific revolution”, affirms that we cannot see something unless we have the correct metaphor to perceive it. Until now, we have been using the incorrect metaphor to understand, plan, and evaluate social change, which has cost us decades of attrition and frustration.

Since Isaac Newton explained that the world works as if it were a big clock (known later as Newton’s “machine metaphor”), we were educated to understand the different types of human organization as if these shared general and basic attributes that functioned under universal laws and that, with sufficient and appropriate information, we could predict and control them. Evidence of this is that many of our theories about management and social change propose that we study the parts in an isolated way (case studies, “representative samples”, approach social problems at the individual level, etc.). We specify in detail the desired changes and the steps needed to achieve these changes. We overcome natural resistance to change and we reduce possible variables or deviations in order to achieve our objectives in the most effective way.

But we know that reality doesn’t really work like this. We know that it is unlikely that the complex problems that we address will act exactly as we predicted, or produce exactly the planned results in the period of time expected.

Despite this, not only do we continue designing and planning our interventions based on this paradigm, but this reductionist and linear perspective also permeates the dominant models and methodologies of impact evaluation. The majority of these models and methodologies assume that: 1) There is always a clear, causal line that links an action step or result with another, and 2) There are no logical leaps in which an activity or result requires some type of “undetermined miraculous intervention”. Examples of this approach include logic models, monitoring with “SMART” objectives, theory-based evaluations, and impact evaluations with experimental and quasi-experimental designs, etc.

It is not a surprise that organizations in general are apprehensive about evaluation processes. In the first place, the majority of these processes do not respond to organizations’ key questions. They do not contribute in a significant way to an organization’s understanding about social problems and processes of change (How does change happen and why?).
Secondly, evaluations in general also do not contribute to the work of organizations in an opportune way, since they are often done at the end of an intervention. This not only does not facilitate the improvement of the intervention being evaluated, but also does not help to inform future actions. Because once the evaluation data has been processed, the organization has already begun its next intervention that, most likely, responds to plans and contracts that are fairly inflexible.

Thirdly, despite goodwill on the part of many funders and the boldness of a few organizations, the main objective and use of evaluations continues to be providing reports and information to public policy-makers and donors for decision-making purposes. The power of evaluations to be an effective tool and mechanism for promoting a sense of belonging and ownership in social change projects by the people involved in them, and for strengthening their levels of understanding about how and why change occurs, has been underestimated.

Planning and evaluating the work of community-based organizations, women’s funds, and other philanthropic organizations is possible and absolutely necessary. The challenge is in doing so in such a way that takes into account the complexities of the context in which they work and the different social change processes that they promote.

The first step towards achieving this is to change the machinist and linear perspective that we have been using to understand, and instead interact with the world from an organic and systemic point of view. This is particularly important when we are dealing with complex, adaptable human systems (such as organizations, communities, and societies) whose actors are capable of influencing at will the behavior of the system.

In this sense, the Science of Complexity offers us an alternative approach to the positivist, reductionist, and linear approach of the Machinist paradigm. The science of complexity studies adaptable, complex systems: how they work, what principles regulate their behavior, how the system transforms through its interactions with its elements, and what disturbs it and forces it to change. The science of complexity in this regard helps us to understand how complex systems really function and evolve (instead of how we think they should function and change) in order to plan and react more effectively. Recognizing and understanding the basic rules and principles that regulate the functioning of complex systems allows us to influence these rules in order to change patterns of interactions and foster the re-adaptation (change or evolution) of the system.
People, groups, and societies are Complex Adaptable Systems (CAS) and CAS are by nature non-linear, contradictory, unpredictable, and uncontrollable.

As CAS, we are made up of many diverse elements, which are interdependent and that interact to create an infinite number of possible results, all unpredictable and uncontrollable. Each one of these elements reacts to the behavior of the others according to its context (internal and external) and its history (past experiences and acquired information). But once established, this interaction will influence the element’s future actions, which at the same time will affect the behavior of the other elements it interacts with and its environment in general. The whole process becomes a constant, dynamic evolution. To this intricate network of relationships and dynamics, we should add the fact that each Complex Adaptable System interacts inside other systems and at the same time also has sub-systems. All of them interact and influence the behavior of the others simultaneously and constantly.

To illustrate further this concept of complex adaptable systems, we can compare it to the process of raising a child. Even though manuals for how to raise children abound, parents have yet to discover the perfect “formula.” Furthermore, when we think that at last we have found the answers, something or someone changes the questions: from one day to the next a child learns something new and changes her or his behavior, thus forcing us to change our strategy once again. Add siblings into the equation, each one changing and affecting the other, and all children affected at the same time by their fathers, mothers, school, and community, and you have a constantly changing terrain for which no map is possible or useful.

The social changes that women’s funds promote are all complex processes, because they respond to patterns of interaction and human dynamics, that is to say, they respond to the behavior of complex adaptable systems. In this sense, raising a child is a complex problem – good luck if you think that it can be done following a step-by-step, universal manual – but that does not mean that progress cannot be made solely because the future is unknown and “unknowable,” and because the situations and “terrains” are constantly changing. What it does mean, however, is that when we are up against a complex problem, we must pay attention to the relationships and interactions inside the system (for example, those we have with our sons and daughters) and adjust our strategy to changes that we observe when they happen. It is more important and effective to achieve the desired impact than stick to any “proven” strategy or pre-formulated plan. And if the nature of complex adaptable systems demands that our plans have higher levels of flexibility, we should expect that our impact evaluations should also adjust to this strategy of evolving social change.
Several systemic thinkers, and more and more players in the field of international development and social change, agree on the need for new models of planning and evaluation that can capture, understand, and give value to the complexities of social change processes. There is a need for models that are able to identify the great variety of effects, expected and unexpected, provoked – intentionally or not – by a determined initiative and by the interaction of this initiative with other interventions and phenomena occurring in the surrounding environment. Exceptions, discontinuities, unexpected results, secondary effects, and even apparent setbacks are important indicators of social change processes and can inform strategies that are implemented to make them more effective. Finally, an evaluation model with a systemic approach helps us to better understand the social change that is happening and explain not only what has changed, but also why and how a change occurred. II

Adopting a systemic approach to evaluation processes does not mean brushing aside all existing concepts, theories, and methodologies. Instead, it means stretching the “limits” in order to see things differently and look at familiar things in a new way. It also means to look at things from a holistic perspective and see what is useful, why, and where we need to innovate to identify key stakeholders and contexts that explain phenomenon, as well as respond to questions about which traditional methods have proved insufficient.

Having said this, it is important to clarify that the P, M, E, and L model with a systemic approach does not claim to cover all aspects of social change, nor evaluate all the details and elements of every intervention. The value of the systemic model of evaluation is not found in the quantity or the detail of evaluated elements, but instead in its capacity to identify “the difference that makes the difference” (the small factors that can set off significant changes) in the processes of change in the system being evaluated.

Michael Quinn Patton, in his book on Developmental Evaluation, affirms that the more complex the phenomenon, strategy, or intervention to be evaluated, the more simplified and greater the self-documentation needed in the evaluation model. The model should be composed of a series of simple, varied, and repetitive activities that are easily applied and understandable by all the stakeholders involved.

This design facilitates the identification of unexpected results and patterns of behavior in the system, enables continuous documentation and systematization of the process of change, and therefore, the process of analysis and learning. It also allows for the easy adaptation of evaluation methodologies and questions about changes identified in the environment because of a highly participatory process of evaluation-action.
For all systems, diversity is essential for the process of learning and its own evolution. An evaluation system should include multiple perspectives, methodologies, cycles, dimensions, and informants that allow to not only triangulate information, but also increases the richness and depth of interpretation and analysis of the observations.

In this sense, evaluation models with a systemic approach take into account the perceptions and perspectives of people and groups who are affected by changes and impact results that are objectively observable and measureable. Tuhiwai Smith, in his book “Decolonizing methodologies,” reaffirms the importance of participatory methodologies that involve groups and peoples affected by a problem from the very beginning, in this case women’s groups and organizations in the region. He goes on to say that when marginalized groups assume the role of investigators, the overall evaluation changes: problems get defined in a different way, questions are reformulated, different methods are chosen, results are analyzed and used in different ways, and the process of investigation itself, as well as the relationship between the evaluator and the object of evaluation, become more important that the final results.

P, M, E, and L models with the above mentioned characteristics could be very useful to women’s funds, philanthropic organizations, and international development in general. However, despite the existence and successful results of some evaluation models methods that have a systemic focus, none of these models that we know of, has ever been applied to strategies of the construction and strengthening of social movements, nor do they respond well enough to the needs and unique characteristics of international women’s funds.

Furthermore, in “Capturing the Change,” a recent study done by AWID about different existing evaluation methodologies, the authors concluded that very few models and methodologies exist that use feminist theory as an interpretive framework of the current social reality, which helps uncover structures and ideological mechanisms that reinforce discrimination or exclusion of women in different realms of society.

The challenge then for FCAM was to design a participatory model of P, M, E, and L that takes into consideration the complexities of social change processes and put the systems perspective in dialogue with the feminist analysis of power relations, at the same time responding to the role, characteristics, and specific needs of women’s funds.
THE CENTRAL AMERICAN WOMEN’S FUND (FCAM) AND ITS ROLE IN SOCIAL CHANGE PROCESSES

The Central American Women’s Fund (FCAM) is a feminist foundation dedicated to mobilizing resources in order to strengthen women’s movements in Central America and support local women’s groups and organizations – in particular young women - in their efforts to advance women’s human rights in the region. FCAM works to achieve a world in which Central American women in all their diversity have their rights of personal security, physical and emotional well-being, economic and social justice guaranteed, and in which they can participate as leaders in the decisions that affect their lives and their communities.

FCAM develops its theory of change based on a holistic and historical feminist analysis of existing power relations in Central American society as a whole, and beginning with the fact that this society is immersed in a global, patriarchal, and exclusionary system, based on multiple relations of power and dominance, exploitation, and oppression that interact and reinforce themselves.

In order for the system to change and for dominating relationships to be transformed into ones of collaboration and solidarity, of equality and equity among people and particularly between the genders, it requires both changes in individuals and their communities, as well as structural changes in the institutions of our societies. These changes cannot be generated just on an individual level. They require profound cultural changes, changes in the societal norms that regulate individual and collective attitudes and behaviors in our societies.

Key stakeholders that push for these actions in the region are women and feminist organizations and the institutions that they are part of. These are the groups, organizations, networks and movements that have the capacity to promote social change on three key levels: 1) Changing behaviors at the individual and collective level; 2) creating a favorable public opinion environment for women’s rights; and 3) reinforcing collective action and social mobilization to put pressure on institutions (families, private institutions of education and health, the media, businesses, civil society organizations, governments, and international institutions, etc.) to change norms and public policies.

From this perspective, FCAM defines its key role as that of contributing to the strengthening and sustainability of these movements and organizations. It does this through three key strategies:
1. SUPPORTING MANY SMALL, LOCAL INITIATIVES AND PROMOTING SHARING AND LINKS BETWEEN THEM AND OTHER ORGANIZATIONS OF THE WOMEN’S MOVEMENT.

According to FCAM, women’s and feminist movements in the region are a system in which organizations of all sizes have a role to play, and therefore their actions and perspectives are complementary and equally important, especially in the case of grassroots organizations that work at the local level and whose work is often invisible. These groups are the lungs of the movements. However, the limited access these groups have to resources and support makes their sustainability depend in great measure on their capacity to connect themselves with other more consolidated national and international organizations. FCAM supports capacity building and creating links and spaces to build organizational networks of groups and organizations at the local, national and regional level, strengthening this way, movements’ capacities of action and their effectiveness.

2. PROMOTING A CHANGE IN THE INTERNAL POLITICAL CULTURAL OF THE WOMEN’S MOVEMENT THROUGH THE PROMOTION OF DIVERSITY OF IDEAS, PERSPECTIVES, STYLES OF LEADERSHIP, PEOPLE AND INCLUSION AS ESSENTIAL VALUES.

FCAM starts with the idea that the recognition and appreciation of diversity and differences is an accelerator for social change, decreases the risk that movements will become stagnant, and open movements to new possibilities and perspectives. In particular, FCAM encourages the dynamism and renovating capacity of young women and their leadership at all hierarchical levels of the movements to which they belong.

3. CONTRIBUTING TO THE SUSTAINABILITY OF MOVEMENTS BY STRENGTHENING THE CAPACITY OF ORGANIZATIONS TO MOBILIZE RESOURCES AND PROMOTING PARTICIPATORY AND COOPERATIVE MODELS OF RESOURCE MOBILIZATION AND REDISTRIBUTION.

FCAM’s mission and role in the social change processes it promotes is thus to strengthen the capacities and conditions of direct agents of social change in order to increase their potential for impact.

This indirect role of FCAM in the processes of social change, its strategic imperatives, and the complexities of social change processes have important implications on the design and implementation of the system used by FCAM to monitor and evaluate its work and impact, as much in the elements that it seeks to evaluate as in the methodologies and approaches used to collect information and analyze the results.

Until now, the methodologies that FCAM has used to evaluate its impact and that of its partner organizations were difficult to implement by the partner organizations, they did not provide timely information to inform future actions, and they were insufficient for observing and addressing the complexities of social change processes that FCAM promotes.
FCAM’S ASPIRATIONS IN RELATION TO PROCESSES AND MODELS OF IMPACT EVALUATION

During the last four years, FCAM has been formulating a series of criteria about the type of model of planning, monitoring, evaluation, and learning that it needs and the characteristics it should have are:

- The P, M, E, and L model should have a feminist approach and should respond to the unique characteristics of women’s funds that include a combination of diverse roles: mobilization of resources, financial support for organizations, capacity building, opportunities for alliances and exchange that are offered, and a role in advocacy.

- It should be understood from its beginnings as a sociopolitical intervention that forms a part and influences the system being evaluated.

- It should have as a key objective to strengthen abilities to learn and adapt to changes in the environment, innovation, and effective strategy for FCAM and the organizations and social movements with which it works.

- It should foster the collective – and participatory – construction of knowledge about the current state of problems and priority populations, the application of ‘good principles’ (in contrast to ‘best practices’), and the how’s and why’s of social change processes.

- It should help identify system dynamics, the interdependencies and emerging interconnections, the most significant changes – planned and unplanned, expected and unexpected – their meaning, emerging tendencies, and opportunities for innovation.

- Finally, it should be accessible to all parties involved (in terms of understanding and participation), flexible enough to adapt to changes in the environment, to be able to evolve along with the system and strategies that will be evaluated, and be able to inform in a timely manner about strategic decisions or strategic directions of FCAM, its partner organizations, and movements it supports.
The complexity of social change related to (in)equity of gender and women’s rights presents multiple challenges to the processes of planning and evaluation of strategies for change.

One of the most important challenges was determined by the emergent nature of social change, which is a product of the interaction of various and diverse stakeholders, factors, levels, and dimensions of the system all interacting amongst themselves and with the environment simultaneously and constantly. These social change processes do not respond to linear logic, and for that reason there is no direct or attributable relationship between cause and effect. In general, this means that no one element (agent, organization, or intervention) of the system can be given credit or blamed with any certainty for any process of social change within the system. Therefore, in the case of FCAM, the applied evaluation model could only identify evidence of direct and indirect contributions (versus attributions) of FCAM to social change observed through its partner organizations (direct sphere of influence) and in the environment (indirect sphere of influence).

A second challenge, related to the first, is that changes that are promoted must be evaluated in relationship to a constantly changing base line. This means that the typical focus of impact evaluations that defines the worth and merit of an intervention based on observed changes in contrast to a base line and pre-defined indicators should be reconsidered when it comes to complex social change processes and long-term transformations such as the relationship between genders and the promotion and defense of women’s rights.

Firstly, base lines that, at the moment of their design and collection, respond to criteria and observations considered relevant to the intervention can change or even be substituted over time because of changes in the context. Secondly, social change processes, because they are unpredictable and emergent, can adopt different forms and characteristics, which make it difficult to establish accurate and sustainable indicators of change over time. This is especially true when uncertainty about the process of change is combined with a diversity of expectations and needs that the different stakeholders involved have about the expected results.

However, a profound understanding of the context, of the probable behaviors of the system, and some type of base line or state of the art phenomenon or problem, are essential for informing strategies and evaluating their effectiveness. For this reason, FCAM decided to include in the evaluation process the creation of a system of monitoring, formative evaluation, and/or a review of the base line results that can be examined and updated regularly to conserve their relevance and usefulness during the process.
The third challenge is related to **self-organized and unexpected emerging phenomena** characteristic of complex adaptable systems and processes of social change. A systemic evaluation model should incorporate “open” evaluation mechanisms that facilitate the observation and identification of these phenomena. The classic example of this process of self-organization is systems of assistance that emerge within communities affected by situations of natural disaster. In response to an imminent need, implicitly shared by each and every member of a community, the lack of resources and a common goal, a system is quickly organized in a spontaneous way to meet people’s needs and achieve a common goal. On a smaller scale, rural communities have been observed to organize and establish their own systems of education and health when authorities have not responded to their demands. Or, an example which was observed in some communities in South Africa, and which was presented on an educational-entertainment program of the Soul City Institute, was that community women took to the streets banging pots, pans, and lids as a way to stop acts of domestic violence in their neighborhoods.

Even though it is important to start with some basic concepts and agreed upon criteria about what we wish to evaluate, leaving a certain flexibility previously unidentified aspects along the way, allows a planning and relevance and the opportunity to incorporate unexpected results or the process of social change.

A fourth challenge for the P. M. E. and L systemic model was to incorporate **distinct perspectives and approaches**, both during the data gathering process and the interpretation and analysis of data. Different stakeholders not only have different expectations about desired changes, but also have different perceptions about which changes and tendencies have been the most important in a given environment. This diversity of perspectives can be achieved by mixing different methodologies for the collection and analysis of the data, different interpretive frameworks, and the greatest diversity of information sources possible.

The final challenge, though not least important, is to ensure that the **participatory methodologies of the model are easy to use, quickly produce results, and are practical in their application**. In principle, this will reduce confusion and a lack of motivation on the part of FCAM staff, partner organizations, and other people involved in the process, as well as increase the usefulness, effectiveness, and sustainability of the P. M. E. and L model that has been designed.
DESCRIPTION OF THE TELEIDOSCOPE MODEL OF PLANNING, MONITORING, EVALUATION, AND LEARNING OF THE CENTRAL AMERICAN WOMEN’S FUND (FCAM)

The teleidoscope is a type of kaleidoscope (which is a device composed of an internal system of lenses arranged like a prism that reflect patterns formed by the interaction of diverse objects) with the difference that instead of using internal visual objects, the teleidoscope uses a clear lens on one end to capture images from the outside, allowing us to observe new patterns of everything that we look at through the lens.

The teleidoscope has a systemic character in the sense that its parts interact with one another, within determined limits, producing an infinite number of compositions according to their movement and the angle from which you look through it. Its system of lenses encounters and is in dialogue with the different behaviors, elements, and actors of the system being observed, allowing not only for triangulation of information, but also for the co-creation of new meanings.

In this way, the teleidoscope is an adequate metaphor to describe the planning, monitoring, evaluation, and learning system designed by FCAM in terms of how it is able to observe the environment in which FCAM and its partner organizations work from multiple theoretical perspectives, methodologies, and approaches, making it possible to identify behavior patterns in the system that otherwise would have gone undetected.

The teleidoscope metaphor offers greater possibilities for understanding complex relationships in the area in comparison to the idea of a ‘collage’ and the ‘fragment’ that have been used in previous studies...the [teleidoscope] metaphor recognizes [each observed element] as a constituent part of its nature, but in no case as the final word. It incorporates constant movement and light gives it energy, but within certain limits, you might say ethics, to consolidate multiple systemic structures within a universe with almost infinite possibilities. These possibilities are not an expression of chaos, but rather a systemic game of successive approximations in which each one of the parts interacts in a synergistic way to find points of equilibrium in an environment whose nature is conflict.

From the epistemological point of view, and using the metaphor of the teleidoscope as a reference, the planning, monitoring, evaluation, and learning model of FCAM is based upon the paradigms of complexity, the feminist paradigm, and the participatory paradigm. From a methodological point of view, the model is made up of three main components: 1) Production and management of new knowledge, 2) Formative research and monitoring of the environment, and 3) Impact Evaluation. All the 3 paradigms that make up its epistemological basis as well as the 3 methodological components of the model, represent the 3 lenses (prisms) of the FCAM teleidoscope model.

These three components and epistemological approaches are placed in dialogue and provide feedback to one another through processes of meta-analysis of the information obtained through the model’s methods, allowing FCAM to observe patterns, tendencies, interactions, and other elements of its work and the surrounding environment that would otherwise go unnoticed by other methods. The FCAM teleidoscope method also allows familiar elements to be observed from new perspectives.
COMPONENTS OF THE TELEIDOSCOPE MODEL

1. Knowledge Management:

The goal of this component is to promote the production and diffusion of experiences and new knowledge between groups, organizations, networks, and social movements that are partner organizations and allies of FCAM, as well as with other women’s funds, philanthropic organizations and international development agencies, which stimulates a horizontal dialogue between the mentioned actors about topics related to social change and gender justice. This sharing of knowledge and experiences also offers ideas for political advocacy initiatives of feminist and women’s movements towards governments and international development agencies.

The methodologies of this component include a variety of research methodologies, notably, case studies, systematizations, theoretical and conceptual proposals, etc.

To pilot this model, FCAM began with a systematization of its philanthropic model, placing an emphasis on the innovative elements of its theory of change and its methodologies for selecting partner organizations and distributing resources. The dissemination phase of this new knowledge among the groups, organizations, and social movements who are partner organizations and allies of FCAM took place throughout 2014. In horizontal dialogue space, the idea was to validate the model and stimulate theoretical and strategic thinking amongst the organizations and people participating.

In addition, SGS S.A. (formerly Société Générale de Surveillance), an international firm specializing in organizational audits and offering services of inspection, verification, benchmarking and certification of companies, NGOs, and governments, performed an institutional diagnostic in which it verified the coherence and consistency of FCAM’s management model and its values of transparency and accountability.

2. Formative/Evaluative Participatory Research:

This component consists of implementing participatory processes of formative/evaluative research on: (a) the situation of women’s movements in the region (their current situation, main challenges, strengths, opportunities, and priorities); (b) the situation of social groups with whom FCAM works (young women, LBTQI, indigenous women, etc.); and (c) the situation of topics of interest for the wider women’s movement in Central America (migration, sexual and reproductive rights, femicide, labor rights, etc.).
The goal of this component is to collectively build a base line from diverse perspectives or analysis of the context (diagnostic) that will contribute to informed decisions and strategic actions by FCAM and the groups, organizations, and movements with whom FCAM works. At the same time, it will serve as a reference to continue evaluating and adjusting different strategies of change that are implemented.

The process itself will also contribute to strengthening the evaluative capacity of organizations and promote alliances and synergy between groups. The “evaluative” part of this component seeks to collectively identify successful strategies and those that have failed to achieve their proposed goals (through collective reviews, the assignment of merit or blame is avoided and more profound, less reactive processes of reflection are facilitated). Above all, the process will identify patterns that these strategies had in common, their relationship to the context at the moment, how this did or did not influence the results, and what the learned lessons were that these experiences could offer to inform current strategies.

This component’s methodology will vary depending on the group with whom one works, the topic of investigation, and the available resources. Even though what the teleidoscope model proposes is formative research at three levels (movements, groups or social sectors, and themes), the distribution of time, depth, and reach of these investigations/evaluations will depend on the priorities and resources available at the time of implementation.

For the pilot of this model, implemented by FCAM in 2013, a formative investigation with groups and organizations of young women in Central America was done, and utilized methods and techniques from “Liberating Structures” (www.liberatingstructures.com), based on the principles of the science of complexity.

3. Impact Evaluation:

This component allows FCAM to evaluate its impact in three aspects: (a) the impact of FCAM's work and strategies on its partner organizations; (b) the impact of FCAM's partner organizations on the environment in which they work and (c) the political advocacy of FCAM in the donor community with respect to their relationship with groups they support and with paradigms of social change.

a) For the evaluation of the impact of FCAM on its partner organizations, social movements and the community of donors, the model adopts principles and methodological elements proposed by Outcome Mapping (OM) which suggests that the purpose of Monitoring and Evaluation (M&E).
is to “improve more than to prove, understand more than inform, and create knowledge more than gain merit.” It seeks then to understand in a retrospective way what changes have occurred with the partner organizations (who from an OM perspective are the Direct Partners of FCAM) and how they have occurred through their interactions with the Fund, and understand how this has contributed directly or indirectly, completely or partially, intentionally or not to these changes. The focus of OM also responds to FCAM’s vision in terms of its nature as a secondary agent of change. The Fund recognizes that the main agents of change are its partner organizations and the social movements to which they belong and support, and for this reason its role of “contributing” to the scope of changes that have occurred in the environment (product of the agenda of FCAM’s partner organizations) through the strengthening of the direct agents of change (organizations and movements).

To identify changes in the partner organizations, the concept of “Most Significant Change” was adopted as well as the proposed approach for this concept, to facilitate the participatory identification of stories of change by the partner organizations, their analysis, and interpretation based on the realities and contexts in which they operate.

Additionally, the teleidoscope model uses Social Networks Analysis (SNA) as a complementary tool in FCAM’s impact evaluation on the strengthening of social movements it supports and its strategy to link and promote alliances between different groups and organizations in the region for the promotion of synergy and collective action.

The SNA is a measuring and analysis tool, supported quantitatively through graphics and maps, that describe and study relational structures that arise when different organizations or individuals interact, communicate, agree, collaborate, etc. through diverse processes of bilateral or collective action. In this way, the structure that emerges through human interactions is translated into a visual social network. Social networks are, therefore, a set of social or interpersonal relationships that bind individuals or organizations into “groups” as nodes, clusters, and islands, as in any system.

Finally, the model adopts principles from Developmental Evaluation and Use-Focused Evaluation, approaches that understand evaluation to be a political intervention that forms a part of, and influences the system being evaluated. Both approaches seek to transform the evaluation process into an opportunity for reflection and learning for the people and groups involved. The tools that are used in obtaining information and in the analysis of the data must include the active participation of these people and groups to identify the most significant changes that were achieved from their perspectives. Using
these approaches also favors that analysis and knowledge creation are done collectively in terms of determining meanings, tendencies, patterns, exceptions, and the identification of challenges that will inform future strategic decisions and lines of action for FCAM and its partner organizations. The findings obtained are complemented by the perspectives of the FCAM team (program officers and organizational leadership), other organizations who are associates or allies, and key people who are a part of feminist movements in the region.

b) The second aspect of impact evaluation consists of identifying evidence of the impact of the work of FCAM partner organizations towards advances in women’s rights. To do this, the teleidoscope model uses annual reports written by the partner organizations throughout their time in relationship with FCAM. FCAM write annual impact reports using the “Making Our Case” guide, an adaptation of the tool, “Making the case” produced by the Women Funding Network. The purpose of this tool is to document the accomplishments achieved in their surrounding environment in terms of changes in perception or conceptualization of women’s rights and their fulfillment; changes made in individual or collective behaviors; changes at the level of commitment to and mobilization for these rights; and changes achieved through advocacy efforts initiated by partner organizations in various fields.

In order to review and extract information from these reports, the model adopted and adapted the “Outcome Harvesting” approach, which is a tool that allows evaluators, donors, managers, and implementers of social change initiatives to identify, formulate, verify, and interpret evidence of change that is presented as possible results of the work that groups are doing. This tool is especially useful when cause-effect relationships are unknown or confusing. In contrast to other methodologies, Outcome Harvesting does not measure progress towards pre-determined results or objectives, but instead collects evidence around what has been achieved, and in a retrospective way determines if the intervention or project being evaluated has contributed to the change being observed and how.\textsuperscript{ix}

In this method, results are understood as changes in relationships, interactions, actions, policies, or practices of an individual, group, community, organization, or institution.\textsuperscript{x} When using the Outcome Harvesting approach, the evaluator or team in charge, extracts information from reports and interviews with the groups directly involved with the goal of identifying the results that groups have contributed to and how the results were achieved. Those results can be positive, negative, planned or unplanned, but the connection between the group’s initiatives and the result must be verifiable.
Information about achievements is initially collected through a group or partner organization’s reports in order to respond to several questions through which those involved can take action: Who changed? (type of actor that changed); Where? (level at which the actor operates); How did they change? (type/level of change achieved); How has the partner organization contributed to the change? (type of strategies used to affect change). Once the evaluating team collects this information, the next step is a space for interaction with the partner organization to validate and complement the information gathered, putting together a set of results that are clearly described and verifiable. If it is viable and required by the purpose of the evaluation, third parties who can attest to the changes made can validate the information about the achieved results. Finally, with the information complemented and validated, the data is analyzed and interpreted at the level of individual results or group results that contribute to a mission, goal or objective and answer the related evaluation questions.

During the implementation of the pilot, the following questions were asked about the information gathered:

- How have the behavior, relationships, interactions, and actions changed in the people, groups, and organizations with which the partner organizations work directly?
- What are the most successful patterns of change? What are the least successful?
- What patterns have the evaluators found in terms of the way FCAM partner organizations contribute to the results and what do these patterns suggest about the effectiveness of the partner organization’s work?

C) One final aspect is related to the political advocacy of FCAM within the donor community through the evaluation of resource mobilization strategies and the evaluation of communications strategies implemented by FCAM. In the future this component will include an assessment of FCAM’s advocacy efforts in the donor community through presentations at conferences, meetings, gatherings, and other international spaces in which FCAM participates and promotes changes in paradigms related to the vision and understanding of social change processes and relationships between donors and partner organizations.
The final stage of the analysis process in the teleidoscope model consists of a meta-analysis of the results of the formative/evaluative research and the impact evaluations. The meta-analysis, which is a naturally systemic process, allows the results gathered through the collective analysis of all information obtained through the different components of the model to be in dialogue (the teleidoscope effect).

The meta-analysis stage combines multiple perspectives and data from a holistic approach to identify at the macro level the patterns of emerging behaviors of the system in order to make strategic decisions based on this information. Similar to the previous analysis processes, the meta-analysis is a participatory process in which the perspectives of the staff and FCAM leadership are combined with that of some strategic allies of the feminist movement.
The set of methodologies used as a part of the teleidoscope model are not new. What makes this model innovative is the combination of the feminist approach, the participatory approach, and the systemic approach in the process of data gathering, analysis, and systematization of the information. Second, as a highly participatory and inclusive model (because of the diversity of sources and perspectives which are considered), and having included among its methodological strategies the collective production of knowledge and capacity building of organizations, the teleidoscope model justifies the nature of its intervention and its cyclical process of research-action. It is a model that regularly and in a timely manner informs strategic thinking processes and strengthens the capacity of organizations to create and analyze knowledge.
IMPLEMENTATION OF THE TELEIDOSCOPE MODEL

Besides the successful achievement of its objective to evaluate their work for the past 10 years and contribute to future plans and strategies, the pilot implementation of the FCAM Teleidoscope Model of Planning, Monitoring, Evaluation, and Learning allowed for the validation of the model, as well as being able to identify unforeseen challenges and learned lessons to improve the model itself.

Among the innovative aspects achieved with the implementation of the teleidoscope model are:

• The unprompted validation of the FCAM philanthropic model. The evaluation questions were not specifically directed at responding to this question, however, the topic emerged in a crosscutting way in all the interventions for which evaluations were done. This enabled FCAM to confirm its theory of change (of strengthening capacities, promote networking and influence the movements’ political culture) and the participatory methodologies of decision-making and distribution of resources that FCAM uses. Another common theme that spontaneously emerged in every component of the evaluation was FCAM’s priority effort to invest in promoting high-quality relationships, the construction of alliances, and collective actions among the different groups and organizations it supports. This was valued by the partner organizations and other consulted actors as an effective strategy for strengthening the broader women’s movement and its effectiveness, as well capacity building with organizations and their impact on their environment.

• Identification of patterns of communication and interaction of FCAM with its partner organizations, other organizations, and allied individuals. During the meta-analysis of results of the different components of the teleidoscope model, patterns of behavior of FCAM began to emerge with respect to their communication strategies with donors, the general public, allies, and partner organizations that demonstrated, on one hand, high expectations on the part of organizations, groups, and individuals that interacted with FCAM in relation to communication processes, consulting or involvement with the work of the Fund, and on the other hand, certain inconsistencies and fluctuations in the systems of information and feedback of FCAM with the above mentioned groups (for example, a need was expressed for more fluid, stable, frequent, and inclusive
communications with the partner organizations and allies, and more constant and timely feedback). Previous evaluations had underestimated or overlooked these behaviors, or, in the majority of cases, had directed attention to FCAM to “fix the problem” in the moment. Identifying these faults as patterns (recurring behaviors) allowed FCAM to review the concept and communications strategies being implemented, and also to address inconsistencies and their causes from a relational and behavior perspective, not just from a technical one.

• The verification of the consistency and internal coherence of the management model of FCAM with its mission, vision, theory of change, values, and principles, as well as the challenges and aspects for improvement, particularly with respect to the active involvement and participation of the current and potential partner organizations in decision-making related to the mobilization and distribution of funds.

• The formative research component gave FCAM the chance to develop a deeper participatory analysis of young women’s rights situation in the region. In a three-day workshop, they were able to achieve the following results: (a) perform a collective diagnostic of the situation of young women’s rights in the region (challenges, successes, opportunities, influencing factors - strengths and threats) and of their opportunities and challenges to promote and defend young women’s rights; (b) define the priorities of the young women’s movement for the next 3 to 5 years; and (c) promote peer feedback, a sense of belonging to the wider movement, and the development of alliances for concrete collective actions. The objectives of the component, its systemic focus, and the methodologies used made a big difference in achieving this end.

• The analysis of social networks, implemented through surveys and a graphic exercise during the formative evaluation, helped to identify patterns of interaction between groups and organizations, including important nodes, isolated groups, factors of attraction, among others. The networks mapping exercise carried out during the formative evaluation workshop allowed participants to evaluate their ability to articulate and consolidate their sense of belonging to the wider women’s movement. Although the lack of methodological capacity to implement the Social Networks Analysis considerably limited the implementation of this component and the later analysis of results during the pilot phase, the exercises that were done were enough to be able to appreciate the value of this methodology and its potential contribution to the final results of the evaluation. Its value was also noted as a process for immediate and strategic planning, and as a tool for all those involved to learn about processes of social change, the role of alliances, and collective action.
In conclusion, the P. M. E. and A. teleidoscope model allowed FCAM to examine together all the different parts of the evaluation process (formative evaluation, impact evaluations, evaluation of communications strategies, evaluation of resource mobilization strategies, and institutional evaluations) and observe themes, problems, impact evidence, elements of that validated methodologies and strategies, etc., which if the components would have all been examined separately as they usually are, would not have emerged.

During the meta-analysis workshop, the FCAM team, its Board, and participating allies were able to combine the results of different components, examine them, compare them to identify contradictions or validate evidence, identify relationships between different factors, dimensions, and elements of the problems being addressed and the processes of change, etc. The process also facilitated the incorporation of new voices and perspectives into the analysis and interpretation of the information, since as a process of analysis and collective construction of knowledge. The results this way have more depth and it is easier to more effectively identify opportunities. In the case of the pilot model being implemented during 2013-2014, this phase is still not complete. A second meta-analysis workshop that includes the participation of partner organizations and other feminist groups who are not partners will occur in the second half of this year.

CHALLENGES AND LEARNED LESSONS
The overall value of the FCAM Teleidoscope Model of Planning, Monitoring, Evaluation, and Learning is highly positive. However, some limitations in terms of time, funding, and methodological abilities of the FCAM team and team of external evaluators affected the quality and quantity of information that could be gathered and analyzed during the first phase of implementation of the model (the pilot phase).

For example, dissemination of the systematization of the FCAM philanthropic model and findings of the evaluation are still pending, as well as the discussion of these documents with partner organizations and other allies. Because of limited time and resources, in 2013 the formative evaluation could only be implemented with the partner organizations of the Young Wave and young feminists in the region.
Formative evaluation workshops are pending with the other social groups that FCAM supports (LGBT, migrant women, indigenous women, etc.) and with the wider women’s movement in Central America. In the case of the impact evaluation, the MTC tool that was used during the early years of FCAM was found to be insufficient and not appropriate to the needs of the model being implemented. One of the important reflections of the evaluation of the model itself is the need to review the tools being used, most importantly Making the Case and Outcome Harvesting, in the future versions of the teleidoscope model to ensure that all the methodologies and instruments are easy to understand and accessible to all parties involved, especially the partner organizations and the FCAM program officers who accompany the partner organizations in the analysis and presentation of results of their interventions. One option being considered is to reuse methodologies like the Most Significant Change, telling of stories, video, drawings, and/or participatory photography, and the Gender Matrix, that may be more appropriate to the social and cultural context in which FCAM works and the characteristics of its partner organizations – usually small groups, with a lack of advanced skills, with a low-level of education, historically marginalized groups, strong history and oral traditions, etc.

In the case of the implemented pilot, it is important to highlight the use of the teleidoscope model for retroactively evaluating the last 10 years of FCAM’s work. The information collected about the impact of the partner organizations on their environments was gathered through interviews with the members and leaders of current groups, but 10 years after many of their projects began. Thus, many of the groups have changed leadership and have no institutional memory of such results. This was an exception in the implementation of the teleidoscope model of P.M.E, and L, since the model is designed to be a tool for constant and timely feedback for organizations and funds that adopt it as an evaluation system.

On the other hand, the lack of training and practice of the Social Networks Analysis methodology on behalf of the external evaluators team considerably limited the results of the final impact evaluation report, since the methodology was applied in a limited and superficial way. For that reason, there was a lost opportunity to learn more in-depth about the process of building social networks and alliances on a regional level. This type of limitation is relatively easy to overcome and compensate for in the future, but it remains a clear learned lesson with respect to the need to strengthen evaluation capacities on the implementation team.

Finally, the meta-analysis is a process that invites rich, deep, complex, and highly participatory reflections. At the same time, this demands enough time and commitment from all those involved to manage the preliminary results and actively participate in the analysis and collective construction of new knowledge. The urgency of sharing the impact evaluation report and the lack of resources to involve more key actors in the process considerably limited the potential of this component.
Besides these specific challenges, it was possible to identify more general challenges that can serve as feedback for organizations interested in experimenting with this model in their own contexts. Challenges that were identified for future implementations of the model include:

- The different contexts in each country in the region, and thus differences in the priorities of different groups made it difficult to generalize conclusions and prioritize strategies. It is necessary to find mechanisms that will facilitate the integration of this diversity without losing the holistic vision of the process.

- There is a need to strengthen the research, M&E, and critical analysis abilities of the FCAM staff and its partner organizations in order to make the participatory process more efficient and productive. Implementing the pilot helped to begin this formation process and now within the country an external team exists that has been trained in the methodologies of the process, but it is essential that these abilities be further strengthened at all levels, particularly internally and with the partner organizations. Otherwise, the lack of local abilities also poses a challenge with regards to the acceptable level of complexity of the methodologies used.

- It is important not to underestimate the amount of time and resources that an evaluation process with the integrated goal of learning demands, above all when the process is highly participatory and includes innovative methodologies. Organizations must plan the time, not only for adequate implementation of the evaluations, but also for the process of defining the key questions and the analysis of the results - from multiple perspectives - and their implications for the processes of social change being promoted.

- There is a need to develop an effective, flexible, and appropriate data management system so that the data does not accumulate, but rather can be used on a daily basis to inform actions, not only of the funds, but also for the partner organizations. This information should be accessible (in terms of accessing it and understanding it) and everyone involved should promote the use of this information.

- It is also necessary to strengthen abilities in knowledge management to produce products based on the information that is gathered that will be useful for everyone.
• The tools being used to gather information should be reviewed and revised periodically so that they are easy to implement for everyone involved and can help gather timely results.

• Finally, the model needs to be reviewed in order to make the research-evaluation-action cycles shorter, more frequent, more affordable, and simpler so that they can be implemented as a part of the regular procedures of planning and monitoring of FCAM and its partner organizations.

FINAL REFLECTIONS

The teleidoscope model of planning, monitoring, evaluation and learning was implemented in 2013 in a selective and experimental way. The intention was, on the one hand, to evaluate the previous 10 years of FCAM’s work. On the other hand, the goal was to validate the methodology and approaches of the model. Based on the pilot, FCAM considers the implementation of the model to be successful and valuable to its work and that of other women’s funds. We are still processing information that was gathered, we have not completed the process of sharing the results in national workshops, and more analysis is needed to triangulate information and identify new patterns of systemic behavior. However, the pilot experience provides enough evidence of the value of the teleidoscope model and opportunities for improvement.

The systemic nature of the model requires it to be a product of constant evolution and adjustments to the different contexts and changes in the environment. It forces us to enter into a process of deep examination of the paradigms of the processes of social change, the type of interactions that we establish and promote, our leadership abilities and systems management, how we handle uncertainty, a lack of control, and the non-linear nature of social change. The nature of the model and its systemic perspective reaffirms the need to adapt some elements of the model to different contexts and needs of the places where it is implemented, which is consistent with its conceptual framework that the context is determining. The model should constantly be reviewed and adjusted to the emerging needs and changes in the environment.

The Central America Women’s Fund (FCAM) team invites you to consider the teleidoscope model as a tool for planning, monitoring, evaluation, and learning that can be adapted to different contexts and combined with other existing methodologies to enrich our understanding of the processes of social change and inform our actions. We hope that in your process of experimenting with the teleidoscope model, new lessons emerge that can contribute to the dialogue about the most effective ways to evaluate the impact of Women’s Funds in the world.
NOTAS FINALES:


ii Such as “Outcome Mapping” (Earl et al, 2001); “Most Significant Change” (Davies et al, 2005); “Utilisation-Focused Evaluation” and “Developmental Evaluation” (Michael Quinn Patton, 2008 y 2011 respectively); “Systemic Action Research” (David Burns...); and “Social Network Analysis” (citation).


v Ibid.

vi Ibid.

vii http://en.wikipedia.org/wiki/Main_Page


ix Direct Partners, is the term adopted in Outcome Mapping to refer to individuals, groups, and/or organizations who directly influence or support a change with respect to a topic or situation of interest. These changes can be expected or unexpected.

x Technique created in Bangladesh by Rick Davis in 1996.


xii Tool for monitoring and evaluating the results of development interventions, which has been developed since 2003 by Ricardo Wilson Grau with collaboration from Claudia Fontes, Fe Briones Garcia, Gabriela Sánchez, Goeele Scheers, Heather Britt, Jennifer Vincent, Julie Lahreniere, Juliette Majot, Marcie Mersky, Martha Núñez, Mary Jane Real, and Wolfgang Richert, and most recently with contributions from Barbara Klugman and Natalia Ortiz.


xiv This definition of results has been adopted from the Outcome Mapping methodology, developed by CIID, 2012.

xv For more information about the FCAM philanthropic model and its methodologies of resource mobilization from individuals and selection of new partner organizations, please reference the document of the systematization of the FCAM model.