Headlight

CONSULTING SERVICES

PROGRESS MARKERS FACILITATION GUIDE

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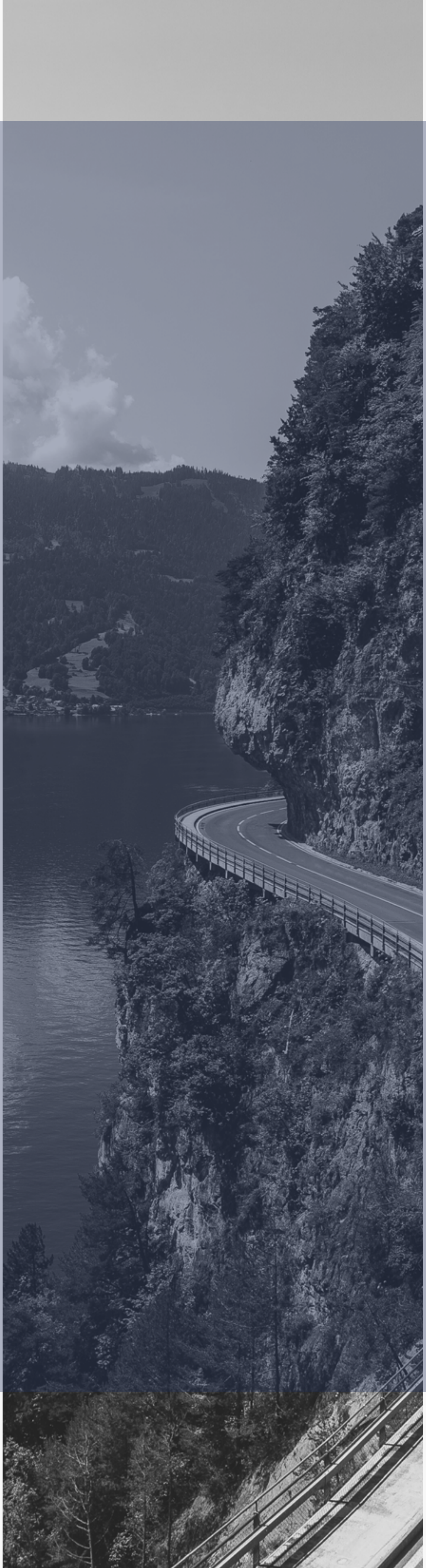
OVERVIEW

The following provides guidance on conducting a Progress Markers Exercise to identify progress markers for any program or activity where the results occur in the medium-to-long-term, but where there is a need to track and report on efforts in the short-term. This exercise utilizes the journey mapping method to identify partner actions that signify a tipping point or marker towards the desired end result.

A Progress Marker is a smaller anticipated action that contributes to overarching outcomes. Tracking progress markers enables teams to show incremental changes in progress made in the short-term. The purpose of mapping the Progress Markers journey is to identify discrete initial efforts that can be measured and reported against before more tangible, external, long-term changes are reportable.

The end result of the Progress Markers Exercise can help to:

- Provide a way to track and report on short-term efforts needed to achieve long term change through indicators. This supports internal implementation progress monitoring, as well as reporting to the donor;
- Articulate necessary and sufficient efforts to achieve a desired result, while allowing flexibility in implementing smaller actions, methods, and processes that must be contextualized;
- Plan an engagement, especially identifying pain points (e.g. places along the timeline where partners will need support to reach the end goal, or lack motivation to achieve the goal); and,
- Provide documentation of the current model of engagement to support both internal and external communications, as well as serve as a map to revisit and refine as additional learnings are identified.



THE ELEMENTS

Journey mapping is a visualization process, identifying the actions an individual or institution goes through to achieve an end goal. In its most basic form, journey mapping starts by compiling a series of user actions into a timeline. Actions of multiple users can be overlaid to identify dependencies, pain points, and pivotal changes that increase the likelihood of reaching the desired end goal. Looking at multiple maps side-by-side demonstrates how different experiences fit together and helps identify where implementer actions best support partner actions and vice versa. This method creates a more complete and nuanced picture, to reliably track progress towards results. While journey maps can (and should) take a wide variety of forms, certain elements are generally included:

Point of view:
Choose the “actor” of the story. Who is this journey map about? As a guideline, when creating a basic journey map, map out one actor’s journey at a time to ensure accurate capture of the full journey before adding in other stakeholders’ actions, perspectives, and influencing variables. This helps create a strong, clear narrative and identifiable pivotal actions.

Scenario:
Determine the specific experience to map. For example, how does disaster risk policy change happen or what is the pathway for supporting demand aggregation of civil society organizations seeking better connectivity services. Identify the starting and ending points of the scenario for typical case studies. This should help set the parameters of the timeline the actors’ journeys will be mapped against.

Actions, mindsets, and emotions:
At the heart of a journey map’s narrative is what the user is doing during the journey. These data points should be based on evidence such as field studies, contextual inquiry, and observations from existing use cases. The granularity of representation can vary based on the purpose of the map.

Touchpoints and channels:
The map should align touchpoints (times when the actor in the map actually interacts with the organization and other stakeholders) and channels (methods of making progress) with user actions. These elements deserve a special emphasis because they are often where inconsistencies are uncovered.

THE EXERCISE

Who needs to be involved?

Anyone who helps implement or support the chosen "Scenario" should participate. This could include programming staff and monitoring and evaluation staff to ensure that the progress markers chosen are measurable.

Who should facilitate?

Anyone with sufficient understanding of the exercise or exposure to Journey Mapping can facilitate. It is often good to have an external facilitator for exercises that will produce internal metrics to minimize bias and extract insights throughout the exercise.

How much time does it take?

The amount of time needed for this exercise depends on the complexity of the "Scenario" chosen (complexity of the intervention, number of stakeholders, etc.). Ideally, teams should dedicate three hours to this exercise to appropriately work through each stakeholder journey and identify more nuanced markers. However, with preparation and focused facilitation, the exercise can be completed in as little as one hour.

When should the exercise be conducted?

This exercise should be undertaken at the start of a program, project, or activity where there is a desire to capture efforts that are hard to measure through more traditional indicators or where progress is traditionally seen primarily in the long-term. Where a progress markers exercise was not done at the start, it can be done at any time during implementation when it becomes apparent it is difficult to properly capture and report on significant efforts being made. The exercise should be repeated whenever there is a significant shift in the implementation model so that the progress markers can be adapted appropriately. Smaller revisions can be made on an ad hoc basis, aligned with small model shifts that evolve with the sectors evidence base.

THE PROCESS

1) Choose a process or journey that you want to map

The journey map created should not represent a singular case study, but rather the main progress markers that should be seen despite contextual differences. Experiences from all existing use cases should inform the journey mapping exercise.

2) Choose an actor to start

A journey map will need to be created for each main stakeholder involved in achieving the desired end result, however the first actor you start with should be the actor whose actions are most pivotal for achieving the desired end results. From this actor's map, you can identify touchpoints and channels that help bring together the other stakeholder maps.

3) Write down the steps necessary to achieve the desired end result

Make sure to include even small steps that may seem trivial. At this point the steps do not need to be on a timeline, but just a brainstorm of all the actions necessary to achieve the end results. As they come up, make sure to also note pain points or specific barriers that are commonly faced, as well as dependencies and assumptions.

4) Organize the steps into a map

Layout the longest timeline (within reason) that this journey may take the primary actor. Then identify reasonable time markers (months, semi-annual, annual, etc.). Next, organize the steps, paint points, and dependencies of the primary actor on the timeline. Review the journey on the timeline and fill in any identifiable gaps. Make sure to leverage the actor's theory of change both in identifying steps, but also in making sure the journey is complete.

5) Repeat #2-4 for all key stakeholders

Once you have a journey map for all key stakeholders that engage or influence achieving the desired end results, compile all the journey maps into one composite map. This may involve using different colors or shapes for the various stakeholders. Make sure the journey maps align on the same timeline.

THE PROCESS (CONT.)

6) Look for insights

Look for patterns, gaps, and points of coalescing in the composite progress markers journey map. Do any recurring dependencies emerge? Are there any gaps in the logic of how change is expected to happen? Are there any actors that are more important than others in catalyzing the desired results? Expand on assumptions, refine the map, and start identifying pivotal progress markers based on your insights. Pivotal progress markers are the ones that will actually be tracked to determine short-term progress. They should represent changes that are most common across case studies, most necessary to continue progress, markers where there is a significant expected shift in attitudes or behaviors of other stakeholders, and measurable in some way.

7) Double Check

If possible, show the map to people familiar with the chosen scenario to validate the actions, their sequence, the identified touchpoints or progress markers, and to ask them what might have been overlooked. Refine accordingly.

8) Identify and compile progress markers

Compile a sequential list of the pivotal progress markers. The list of progress markers should be documented, aligned to an indicator, and incorporated into a Monitoring, Evaluation, and Learning plan. The progress markers can then be integrated into a tracker for easy monitoring of progress, capture of evidence confirming progress, and reporting against the associated indicator. For more guidance on how to establish a progress markers indicator and set up a monitoring tracker, please see Headlight's supplemental guidance note about putting Progress Markers in Action.

Breaking Barriers Evaluators Journey Map Example

FOR MORE INFORMATION,
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