

A decorative pattern of hexagons in various shades of green and blue, arranged in a honeycomb-like structure on the left side of the slide.

Welcome!



**CAUSAL
PATHWAYS**

The Causal Pathways Initiative

Making visible the "black box" of philanthropic and systems change strategies, helping us collectively see how systems are (or are not) changing

An international network of evaluators, methodologists, philanthropic leaders, and more.

Focused on supporting philanthropy, other funders and their evaluation partners to open-up the black box of strategy and systems change by **building awareness, will, and skills to use evaluation approaches that can make sense of causal relationships** without depending on more traditional experimental and quasi-experimental approaches.

Causal Linking Monitoring:

Monitoring and evaluating complexity in causal pathways

Presented by Heather Britt

Causal Link Monitoring



Heather Britt

Independent Evaluator



www.linkedin.com/heatherbritt



www.heatherbritt.com



Just one acronym today....

Causal Link Monitoring = CLM



Causal link monitoring is an approach to designing and implementing monitoring, evaluation and learning activities. It helps you decide what, when and how to monitor and evaluate.

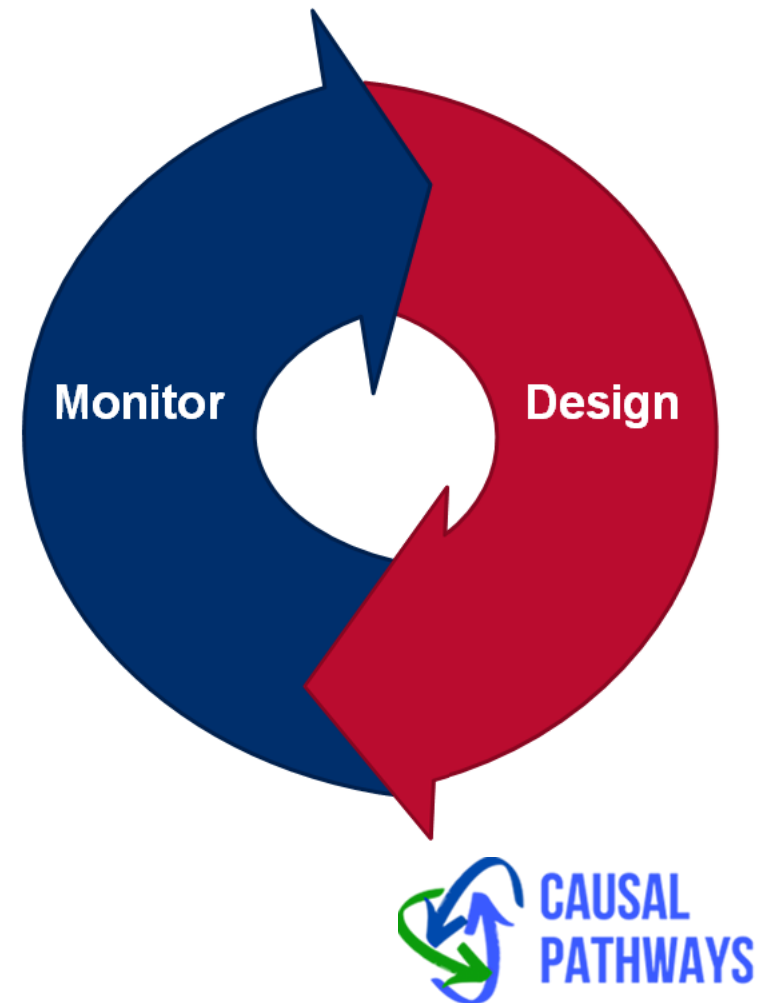
Causal Link Monitoring in practice

Build/enhance a theory of change
to identify where a project is most sensitive to complexity

Plan to monitor/evaluate to understand causal pathways and adapt to changes in dynamic contexts

Collect and use data to steer project

Update the theory of change to reflect new information and project adaptation



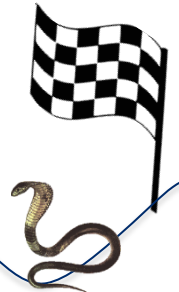
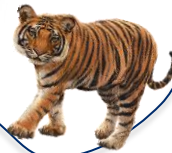
Poll: What is your experience with theories of change?

1. Do you use theories of change for **planning projects or strategies?**
1. Do you use theories of change for **planning monitoring or evaluation activities?**

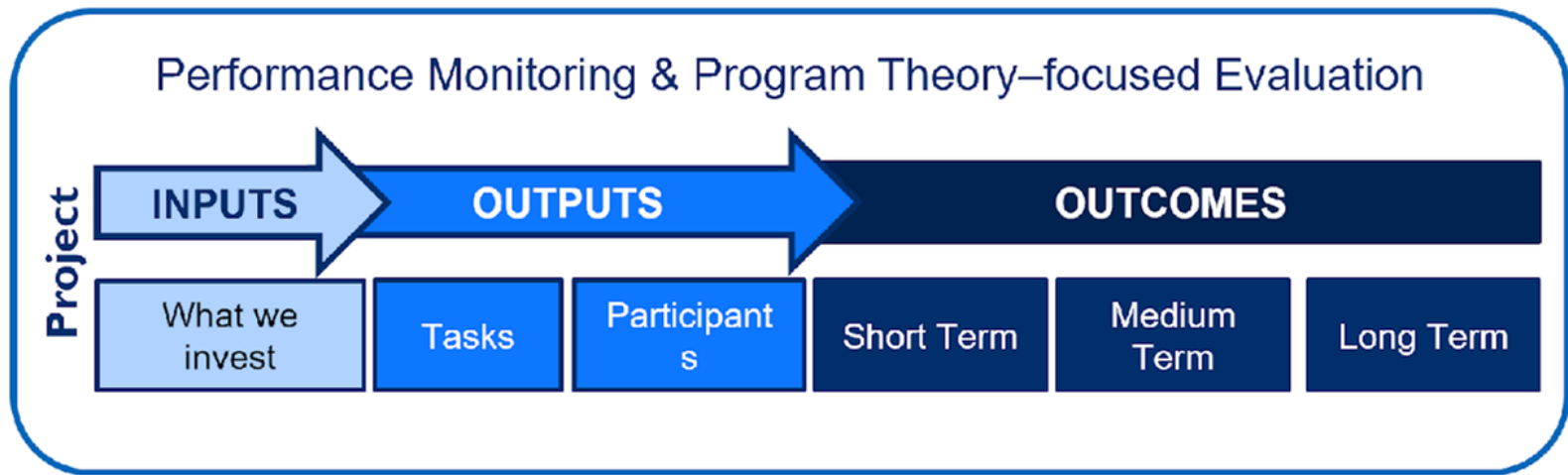
Your Plan



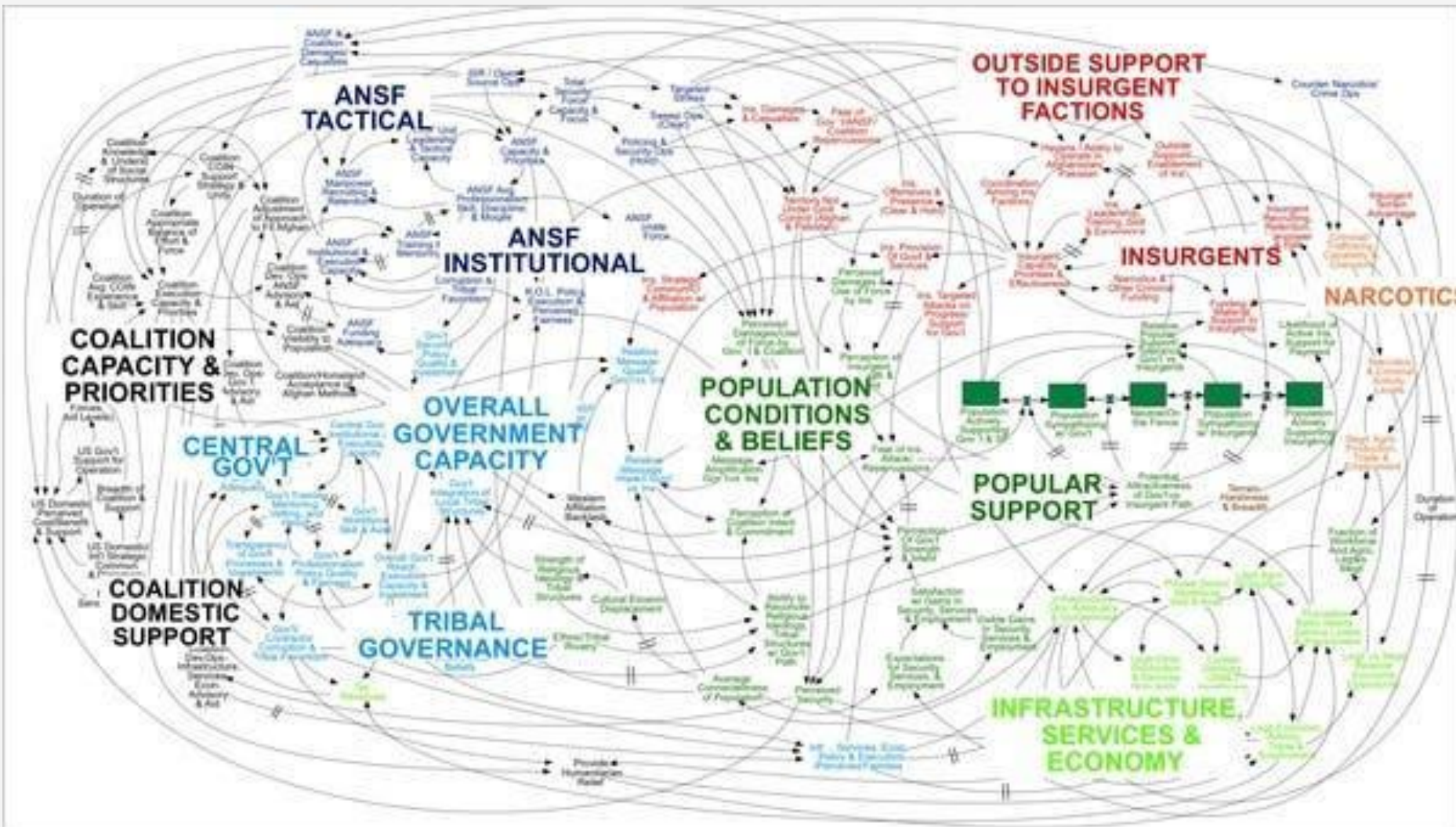
Reality



Causal pathways may be too simplistic

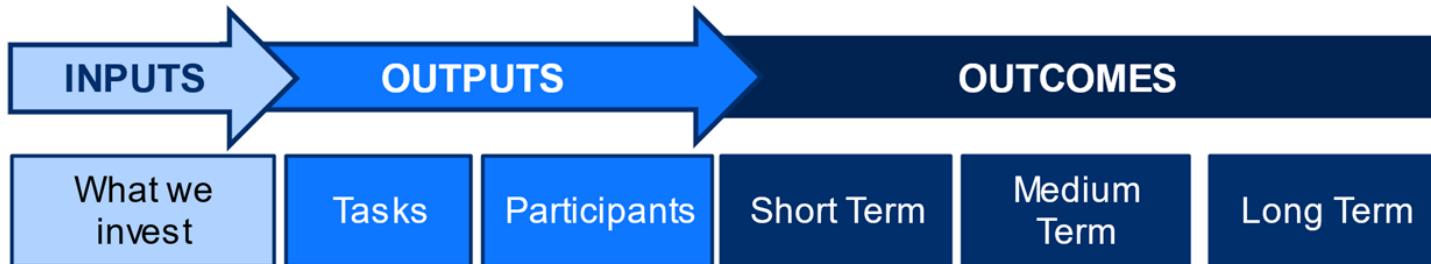


Causal pathways may be too comprehensive



CLM helps determine what, when and how to monitor and evaluate

Project monitors and evaluates the theory of change



Project conducts little or no tracking of the context

Complexity influences projects in different ways

- **Contextual factors** influence the project.
- Stakeholders bring **diverse perspectives**; goals and strategies are contested; consensus is impractical
- **Uncertain and unpredictable** cause and effect relationships in the project logic model
- Project is likely to contribute to **emergent** (unpredictable) outcomes
- Pace of change is **dynamic**; changes can lead to new opportunities and/or needs
- Adaptive management is necessary to steer effectively



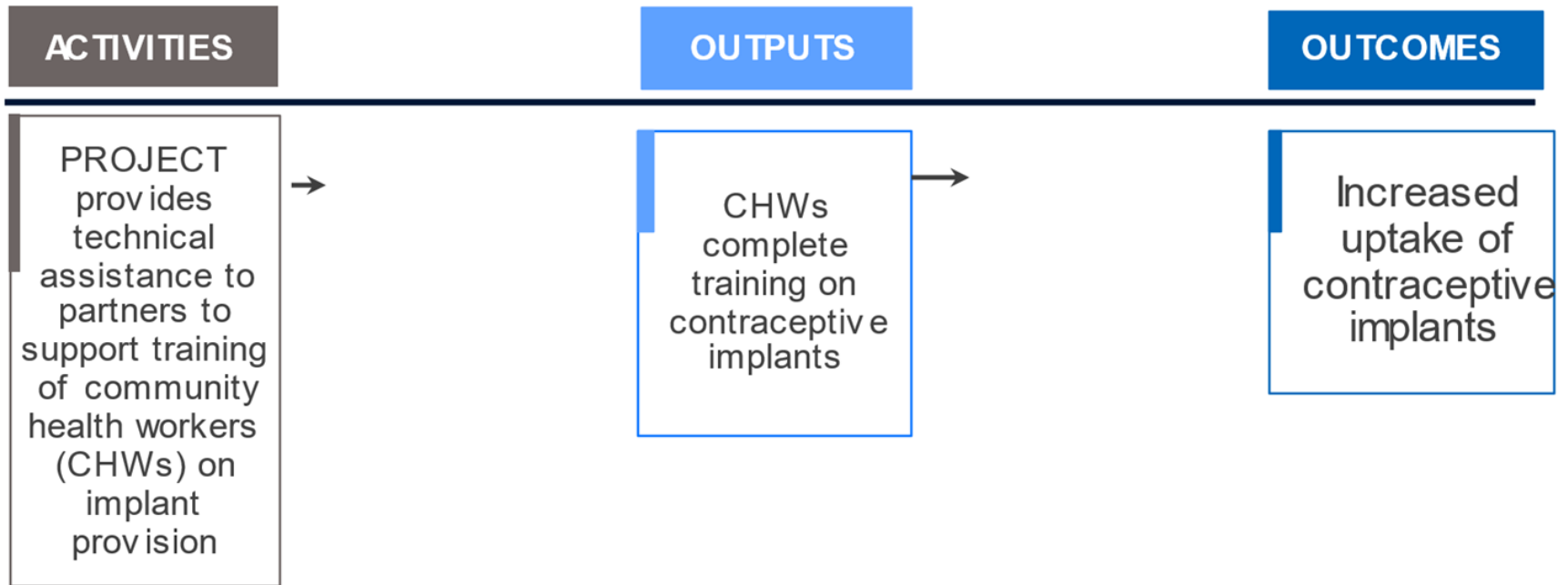
CLM addresses different levels of predictability across a project's casual pathways.



Sample Project: Building the capacity of local partners to increase uptake of contraceptive implants



Building the capacity of local partners to increase uptake of contraceptive implants



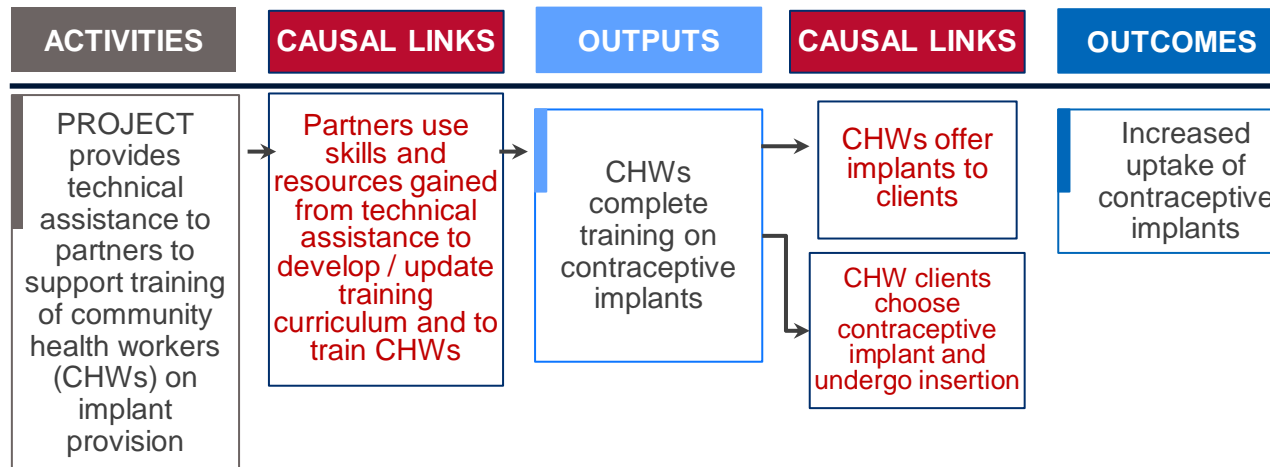
Use CLM's enhanced theory of change to learn about complex causal pathways



- TOCs for causal learning pinpoint where the TOC cannot predict accurately.
- Anticipate where to monitor, evaluate and learn during implementation
- Improve understanding of complex causal pathways



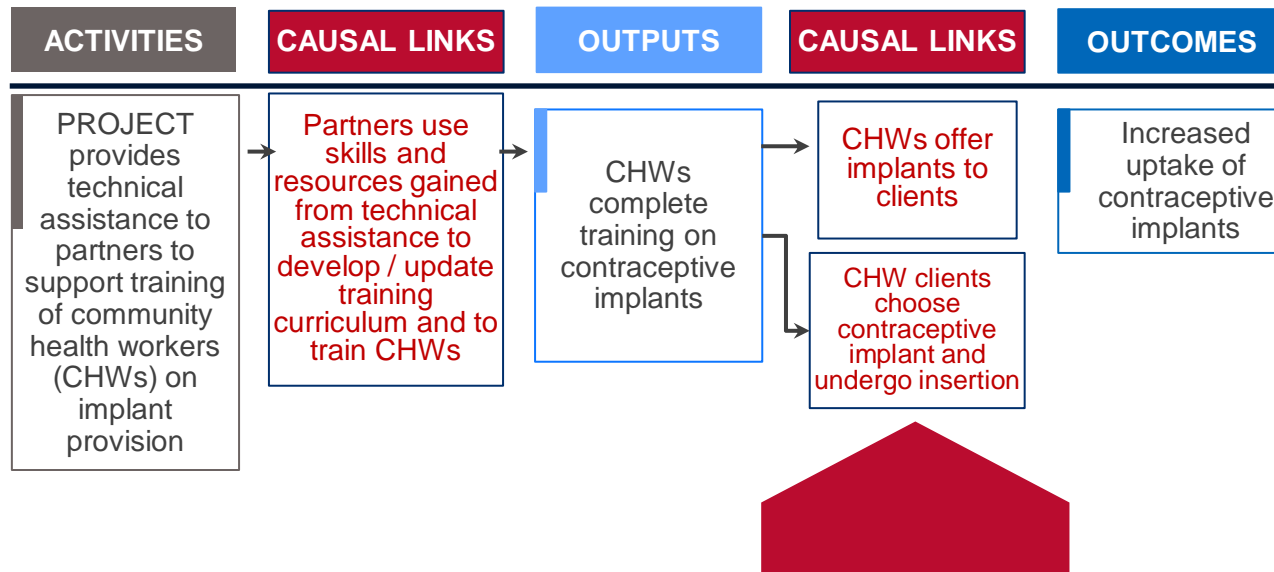
Building the capacity of local partners to increase uptake of contraceptive implants



Theory of change enhanced with:

- Uncertain causal links (assumptions)

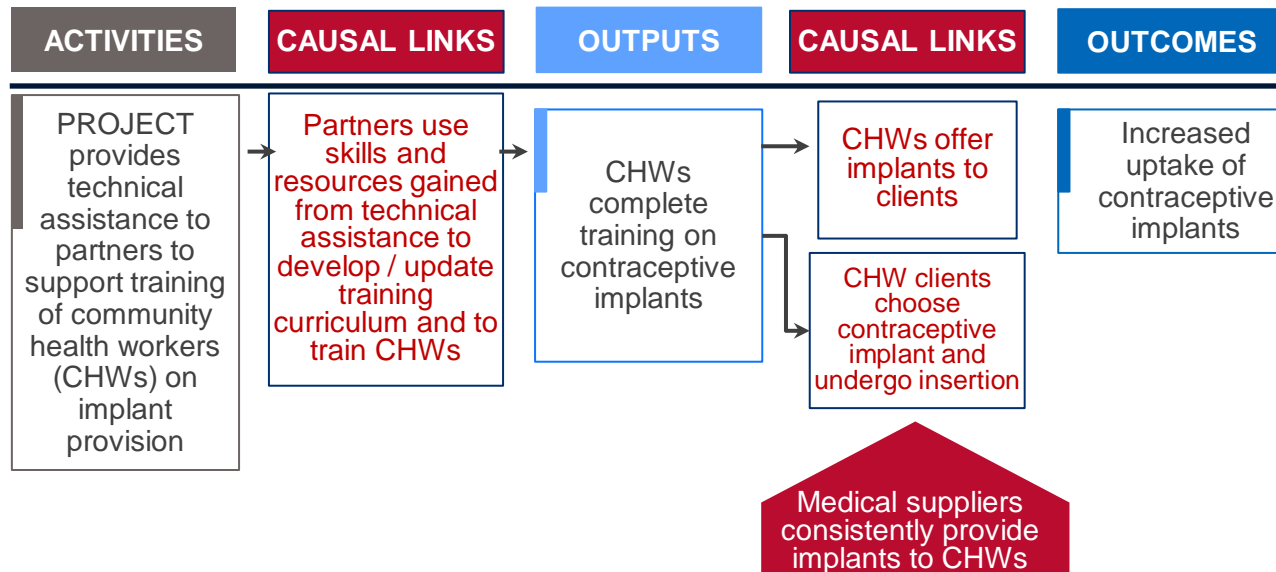
Building the capacity of local partners to increase uptake of contraceptive implants



Which of the following are contextual factors?

- Local partners use skills gained from technical assistance to develop/update training curriculum and to train CHWs.
- Medical supply chain suffers from disruptions; medical suppliers cannot consistently provide implants.
- Government diverts family planning funds to other public health issues.

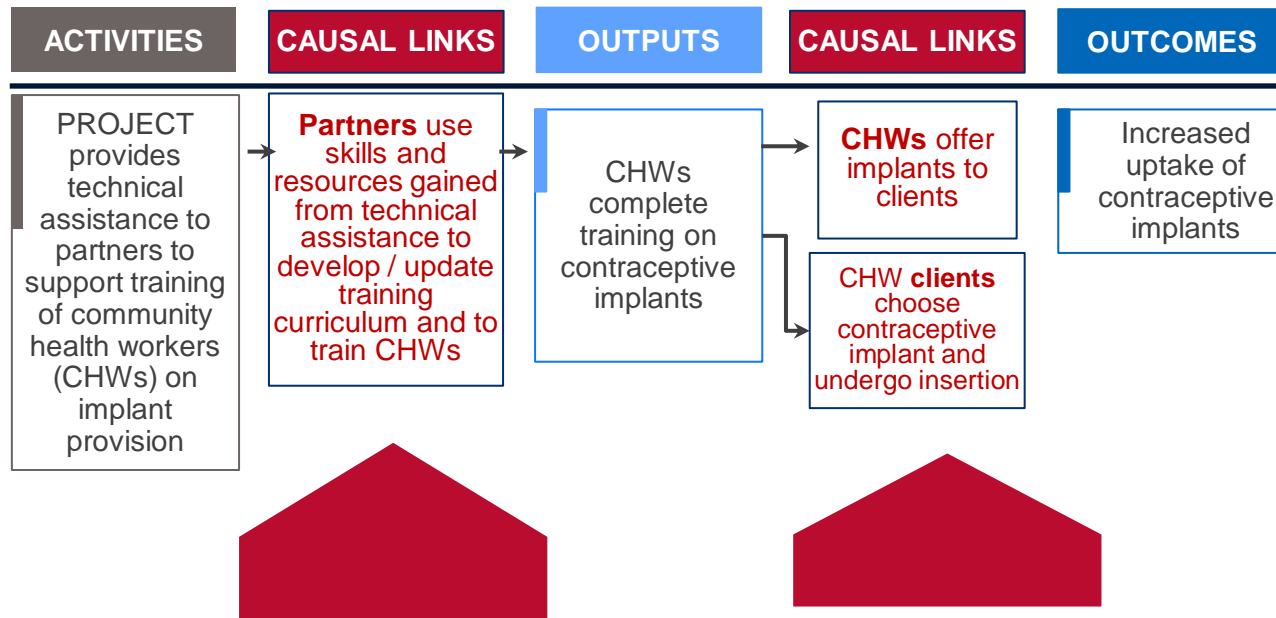
Building the capacity of local partners to increase uptake of contraceptive implants



Theory of change enhanced with:

- Uncertain causal links
- Contextual factors

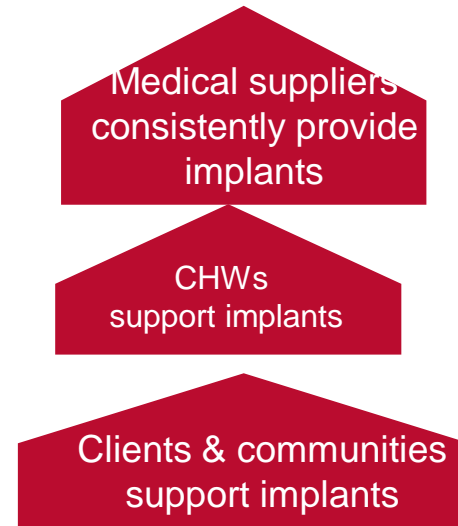
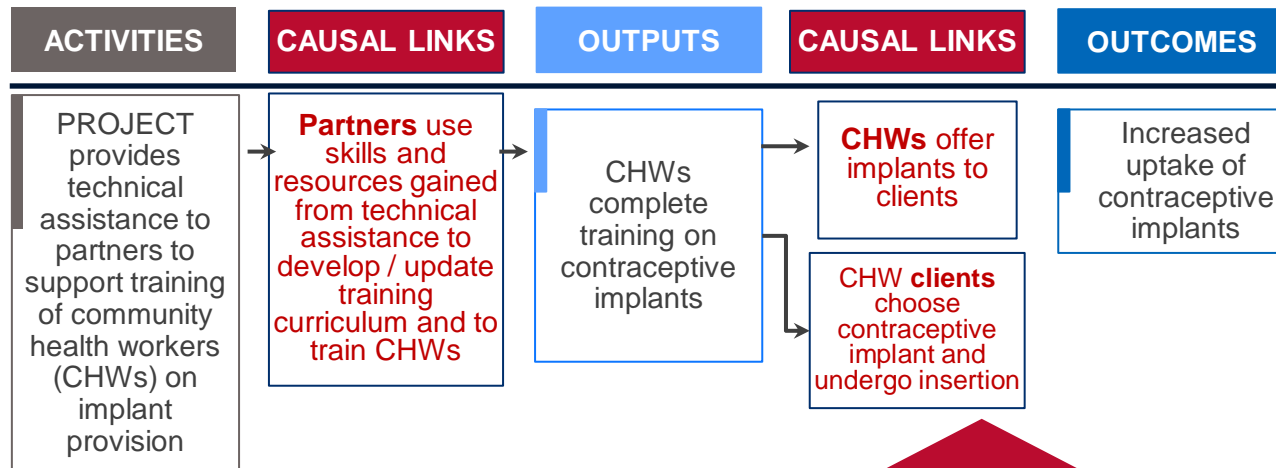
Building the capacity of local partners to increase uptake of contraceptive implants



Whose perspectives do we prioritize for monitoring and evaluation?

- Whose perspectives influence the achievement of outcomes?
- Whose views on the situation are likely to be different from the project?

Building the capacity of local partners to increase uptake of contraceptive implants



Theory of change enhanced with:

- Uncertain causal links
- Contextual factors
- Diverse perspectives

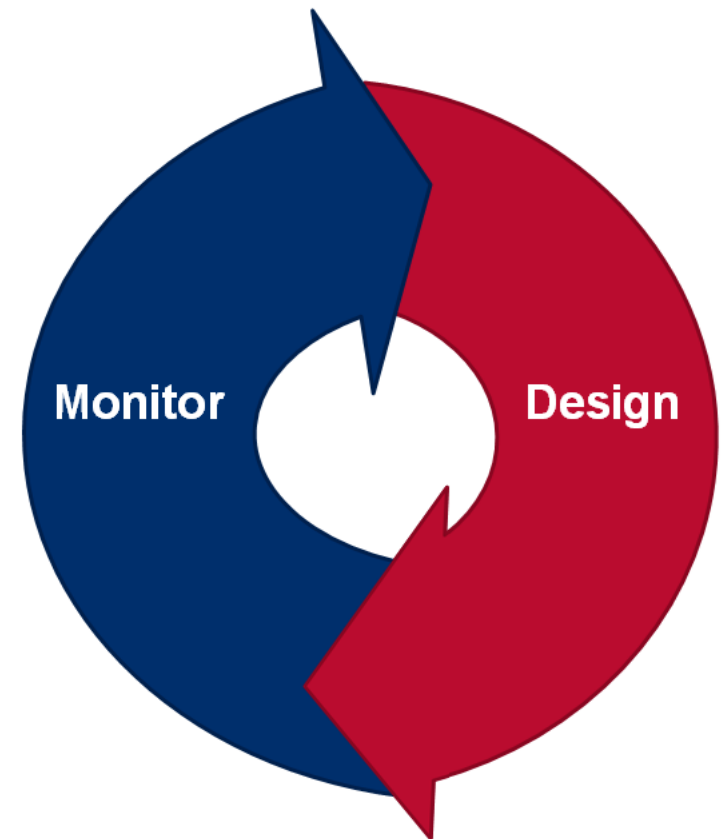
Causal Link Monitoring in practice

Build/enhance a theory of change
to identify where a project is most sensitive to complexity

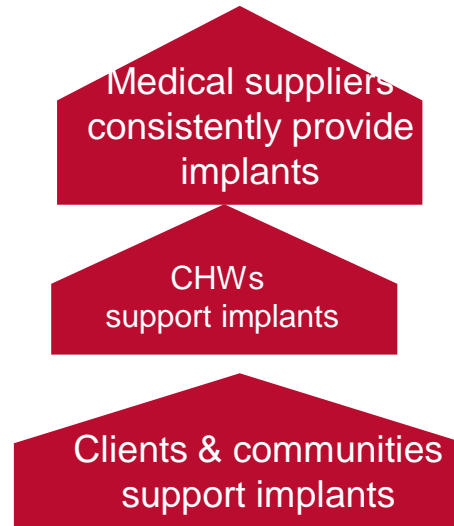
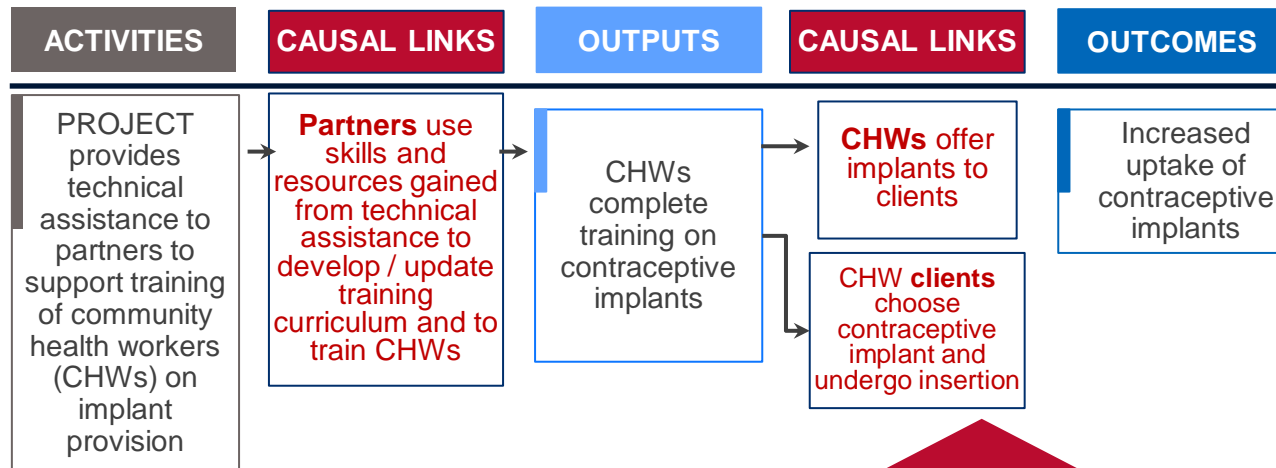
Plan to monitor/evaluate to understand causal pathways and adapt to changes in dynamic contexts

Collect and use data to steer project

Update the theory of change to reflect new information and project adaptation



Building the capacity of local partners to increase uptake of contraceptive implants



Theory of change enhanced with:

- Uncertain causal links
- Contextual factors
- Diverse perspectives

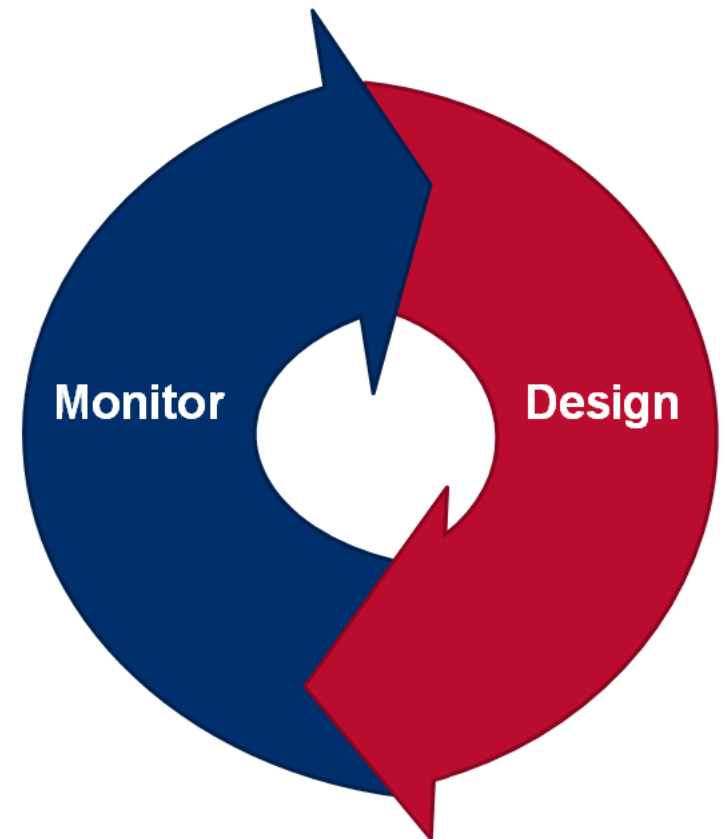
Causal Link Monitoring in practice

Build/enhance a theory of change
to identify where a project is most sensitive to complexity

Plan to monitor/evaluate to understand causal pathways and adapt to changes in dynamic contexts

Collect and use data to steer project

Update the theory of change to reflect new information and project adaptation



Questions?



How does CLM strengthen learning about causal pathways?

1. CLM provides a fresh perspective on which causal relationships to examine -- the interrelationships between the project and context
2. CLM helps to prioritize where and when to monitor and evaluate.
3. CLM helps us to select monitoring and evaluation methods that fit
4. CLM helps us to weigh trade-offs between timeliness, resources and data quality



CLM adds value throughout the project cycle

- Developing a **theory of change** that pinpoints complexity
- Designing an **M&E plan** and making decisions about what to monitor, why and how
- Planning an **evaluation** to inform adaptive management
- Conducting a **mid-course project review** with stakeholders



Reflection: What are your priorities for understanding complexity in causal pathways?

Complexity

CLM can help by tracking ...

Uncertain causal links

Where would it be helpful to understand stakeholder causal contributions before results are observable?

Contextual factors

Where is the project sensitive to influence from the context?

Diverse perspectives

Where is the project sensitive to low agreement among stakeholders?

Emergent outcomes

Is the project contributing to unplanned results?

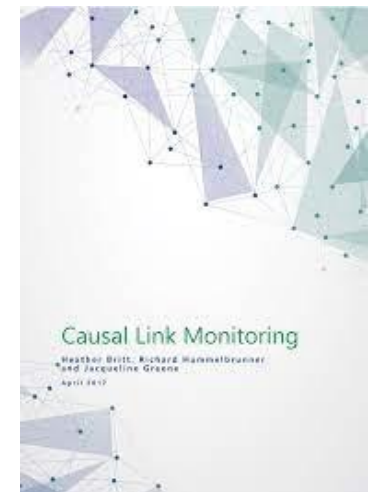
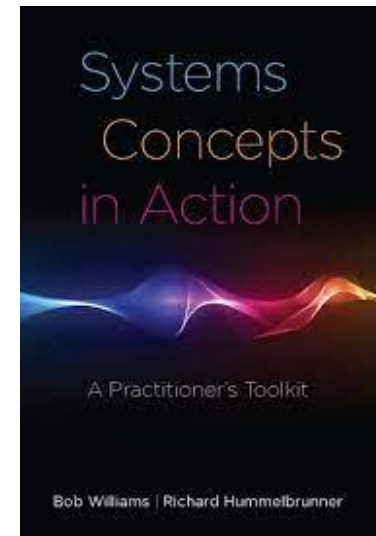


Discussion

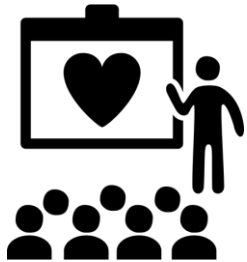


Learn more about Causal Link Monitoring

- Process Monitoring of Impacts in Williams, B., & Hummelbrunner, R. (2010). *Systems concepts in action a practitioner's toolkit*. Redwood City, CA: Stanford University Press.
- Britt, H., Hummelbrunner, R. and Greene, J. (2017). [Causal Link Monitoring](#). Available on BetterEvaluation.
- More resources coming soon! Contact Heather@HeatherBritt.com



Resources from the Causal Pathways Initiative

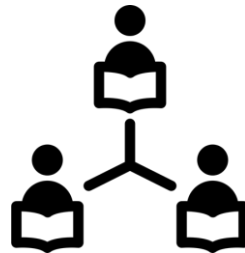


Presentations & trainings to build understanding and will

American Evaluation Association

Available to attend other events by request

Virtual 101 level training available on request



Resources to support understanding and action

Pending:
BetterEvaluation.com updated resource hub on causal pathways

Case studies to provide overall stories and more detailed examples



Learning and acting together with support

Brain Trust to help funders work through tough questions with field experts

Pending: Peer learning spaces and early career support