Guide to Influence Matrix, a Tiny Tool
Version 1.2
www.ngo-ideas.net

> **Our Vision for the Influence Matrix**
> Communities assess the change that happens around them. Through structured reflection with tools like the Influence Matrix. They
> ✓ realise what change happened,
> ✓ come to understand what led to this change,
> ✓ become aware of how they can influence developments, and consequently act on it.
> This happens initially with the facilitation from NGO staff or other external persons. Community facilitators can normally learn the application of the Influence Matrix easily. This process also provides NGOs with a better understanding of the dynamics and priorities in a community.

INTRODUCTION

NGO-IDEAs develops tools for communities and grassroots organisations to measure change and to understand what contributed to change. Some tools are described in the Impact Toolbox. Other tools for communities to reflect on change around them are collected in "Tiny Tools - An Overview". They are all handy and relatively easy to apply. One of these Tiny Tools is the Influence Matrix. More about NGO-IDEAs and its tools: www.ngo-ideas.net. NGO-IDEAs would appreciate feedback and suggestions for improvement. Please contact Eberhard Gohl (gohl@impact-plus.de) or Bernward Causemann (bc@causemann.org).

A. PURPOSE OF THE INFLUENCE MATRIX

The influence matrix was designed to attribute observed changes to project activities, and to identify useful and not so useful activities. With the Influence Matrix, community members and the NGO get an idea of the most important changes in the community and the most important influences (e.g. important project activities or other factors), and which influences can be linked to the changes. The influences can be assessed to be positive or negative.

B. WHEN TO USE THE INFLUENCE MATRIX

During a group discussion, the strength of the influence of every project output (or external contribution) on each observed change is assessed.

There are many situations when we could use the Influence Matrix whenever there is a community that is prepared to reflect on its situation:

> **Links and References**
> Neubert Susanne 2010: Description and Examples of MAPP. Method for Impact Assessment of Programmes and Projects, DIE, Lusaka 2010, www.ngo-ideas.net/MAPP/

- ✓ when there is a need to (re-)consider development efforts in the community,
- ✓ for an evaluation or impact study,
- ✓ to know more about the effects of specific development activities. It is also possible to compare the influences of different projects.

C. REQUIREMENTS: THIS IS WHAT I NEED

- ✓ **Participants:** About 10-15, either an existing group or a cross-section of a community, or a focus group selected according to clear criteria. If the group is bigger it will take more time, and needs much experience and skill. If the group is smaller, we run the risk that important sections of the community are not present and cannot bring in their views.
- ✓ **Material:** A flipchart / big paper and markers.
- ✓ **Trust:** The NGO should be familiar with the area and have good relations with the stakeholders. The chosen group should be an entity, a community, e.g. representatives from a village.
- ✓ **Facilitation skills and attitude:** The NGO staff needs knowledge and skills in facilitation and application of PRA tools; they especially need to be trained in Influence Matrix. They need to have an intention to help the community really understand the change and believe in empowering people. People should have experience with PRA tools. Otherwise it makes sense to first apply tools like Trend Analysis or Activity List.

- ✓ **Time:** One hour for 5 changes X 5 influences, for the 4 steps (not counting preparation). If more changes and influences are analysed, it lasts longer, though participants tend to proceed faster once they understand the process.
- ✓ **Follow-up:** Project activities which show high impact might be strengthened, and those which do not show major impact should be reconsidered.

D. HOW TO DO IT

Prepare a matrix on a flip chart.
Explain the purpose of the exercise to the group or community members present and make sure that they are well familiar with the community's development.

Step 1: Make a list of changes / criteria
Determine a time span to be looked at, e.g. 5 or 10 years. The time span could include one year previous to the beginning of the project. Ask which have been the most significant changes in the community since then. Prioritise five significant changes (or up to 10 if you are familiar with the tool). Refer to previous meetings held with the community which may have given information on the most relevant changes which have taken place.
→ **List these most relevant changes in the first (left) column.**

Step 2: List important project activities
List the project activities which have been the most important ones for the community. You may include other important influences, e.g. from other projects. Prioritise five important influences (or up to 10 if you are familiar with the tool). Refer to the history of the project.
→ **List these most important influences in the first (upper) line.**
Note: Both changes and activities can be written. If participants are illiterate, you can also draw a symbol for the change. For example: for cattle breeding, draw a cow, for harvest, draw a food store.
Note: It is also possible to select criteria and activities in advance. The community should then get the opportunity to add one or two that they find very important.

Step 3: Score the influence
For each cell of the matrix ask: *How strongly was "this change" (which is written at the left end of the line) influenced by "this influence" (which is mentioned above at the top of the column)?* It is advisable to go down the columns to rate one influence after the other, but when people jump to other issues, you can also have them rate these first.
Score the influence on a scale from
    0 = no influence
    1 = weak influence
    2 = medium influence
    3 = high influence
(In the example below: The influence of draught animals on crop yields scores 3, that means: it has an important influence)
If the influence is negative, mark a "–" before the score number. (e.g. "–1" means: weak negative influence)
Note: You can also use a scale of 0 = no influence, 1 = moderate influence, 2 = strong influence.

Step 3 gives important information on the outcomes and impacts of the various activities. The analysis is not linear (like in the Logical Framework) but it systemically shows the interrelations between all the changes and all the influences. Communities often find these reflections very relevant and enlightening.

Contributing factors: / Influence on:	Draught animals	Planting of trees	Alphabe-tisation	Hygiene measures	Organi-sational support	Juridical support	Passive sum (what has been influenced?)
Crop yields	3	2	2	0	2	0	9
Family revenues	3	1	0	0	2	2	8
Health state of children	0	1	3	3	1	0	8
Access to re-sources	1	1	3	0	3	3	11
Gender equality	0	1	3	3	3	2	12
Political participa-tion	0	1	3	0	3	1	8
Human rights	0	0	3	1	3	3	10
Sustainable envi-ronment	2	3	1	3	2	0	11
Active sum (what has influenced?)	9	10	18	10	19	11	

Source: FAKT/Impact Plus: Methodological Notes for Outcome and Impact Assessment, Stuttgart, Dec 2008, p 14, slightly altered
Alphabetisation = Adult literacy training

In the example we gain the following insights: Gender equality was most influenced by the project and the organisational support was the most influential project output.

Farmers Association in a village in Bangladesh

Interventions / Indicator for change	Seed selection and de-velopment	Seed ex-change	Vege-tables	Or-gani-sation	Media expo-sure	Micro-credit	Passive sum (What has been influenced?) Total positive	Total negative
1 Income	1	2	1	1	1	0	6	
2 Availability of seeds	1	2	1	2	0	0	6	
3 Skills	2	1	1	2	1	0	7	
4 Farmer-farmer relations	2	2	2	2	2	-2	10	-2
5 Food security	2	1	2	1	1	0	7	
Active sum (What has influenced?) Total positive	8	8	7	8	5	0		
Total negative						-2		

Source: Bernward Causemann.

The program introduced local food plant varieties in a village to replace high yield varieties that need agro-chemicals. Villagers founded a farmers association and in June 2011 rated the influence of the various activities. We gain the following insights: Farmer-to-farmer relations were most influenced by development interventions in this village. Seed selection, seed exchange and self-organisation were the most influential factors.

Step 4: Sum up the different influences in the lines and in the columns
Once all the relevant influences have been included in the matrix, we form "active" and "passive" sums.
- The "active sum" reflects how much influence each activity had (the one which reaches the high-est active sum is the most influential).
- The "passive sum" shows which significant change has been influenced how much (the ones with the highest passive sums have improved the most).

Positive and negative figures are summed separately.

Step 5: Interpret the result

When the matrix is completed, discuss the overall interpretation: What does the matrix mean to the people present? Were these really the major influences? What other interventions were relevant, what other changes?

→ It helps to start by asking a community member to summarise what the matrix shows – or you explain it.

Step 6: Discuss action and seek feedback

Discuss with the group members what action they would like to take: What do they want to do in the short term to bring about more change? What do they want to do in the mid-term? To impact on what?

→ It helps to ask: What else needs to change? What activity would bring a lot of change? Finally: Ask for feedback on the methodology: Was the exercise useful? Would they recommend it to others? Could you do this exercise yourselves?

Step 7: Reflect afterwards

After leaving the community, discuss among the NGO staff: a) What lessons do you draw from the exercise? b) What would you do differently next time? c) What immediate action should you take? d) What should change in the mid-term in your work with this community (or other communities)?

E. PRACTICAL HINTS

✓ If people disagree on how to rate a specific influence: We need to help the community to find out the reasons. The reasons may sometimes be more important than the final scoring, and they should be documented. – But maybe developments have been different for different groups: Some have benefited from the planting of trees, others live too far away to profit. Or the activity was better for men or for women, for fisher folk or agriculturalists. In that case we can repeat the Influence Matrix separately with these specific social groups to find out more details.

✓ It is possible to give values like 0.5 or 1.5 if the participants want to.

✓ It is quite a challenge to do this exercise with the whole community. But if a reduced number of participants is selected by the community, this could build trust and ensure a broad representation.

✓ Keep the chart, or a photo, as a reference for the next exercise. Note the names of those who participated.

H. SOME WORDS OF CAUTION

✓ It should be emphasised here that this tool requires a genuinely participatory approach: It needs, most of all, to help community members to understand better the change around them. It is only secondary that it serves the NGO to get more information.

✓ The Influence Matrix cannot be used as the only instrument to assess change. It needs triangulation with other tools, as a bias can develop (like with all other tools). It is particularly powerful as a tool. It can also be systematically combined with other tools, like in MAPP (see reference on p.1).

✓ How often should the Influence Matrix be applied? It should not be done every year, but can be repeated after a few years.

✓ This tool combines a number of different indicators and adds them. But the influences and the qualities of life might carry different weights: some are more important than others. There is a methodological discussion if numbers may be added so easily. A good reflection on weighting with lots of resources can be found on www.mande.co.uk.

Eberhard Gohl / Bernward Causemann / Impact Plus / 16.1.2012