SENSEMAKING

intrac for civil society

Sensemaking is a process in which people jointly make sense of information, and develop a shared understanding. It is based on an assumption that individuals have different interests and perspectives, and often see information in different ways. When used for monitoring and evaluation purposes, sensemaking can draw on information acquired through both formal and informal processes.

Sensemaking is a process in which people jointly make sense of information, and develop a shared understanding. It is based on an assumption that individuals have different interests and perspectives, and often see information in different ways. When people come together to discuss their different perspectives a deeper and more reliable, shared understanding can result (Smit 2007).

One useful way of understanding sensemaking is to view it as a collaborative process in which information is translated into knowledge and then wisdom (see box below adapted from Britton (1998)).

Information, Knowledge and Wisdom	
Information	Information includes raw facts and opinions. It can be developed through formal processes, carried out as part of monitoring, evaluation, impact assessment or research exercises. But it can also be generated through informal processes.
Knowledge	When information is systematically organised through storage, processing and analysis it turns into knowledge. This knowledge can be used to answer questions and draw conclusions.
Wisdom	Wisdom is a process that involves combining knowledge with experience, understanding, common sense and insight to guide action and make decisions.

Sensemaking can be applied at any stage of a project or programme cycle. It can be used when developing a Theory of Change for a project, programme or organisation. It can be used during project or programme design, or during a situational analysis, to make sense of existing information in order to help plan a project or programme. It can be used as part of ongoing monitoring. It can be used within reviews, evaluations or impact assessments, either midway through a project or programme or at the end. And it can be used some time after completion of a project or programme.

Sensemaking can be done at any level of a CSO. It can take place within a project, programme, region or country. Sensemaking can also take place within a defined sector or theme (such as governance, health or climate adaptation), in which case it may cover many different projects, programmes, countries or regions. Sensemaking often involves stakeholders from different organisations coming together to look at information across common themes or sectors.

Within M&E, sensemaking can draw on many different types of information. These include the following:

- information acquired through formal monitoring and evaluation processes, such as interviews, surveys or focus group discussions;
- information collected informally on an ongoing basis by individuals as they go about their work, including talking to different people, seeing what is happening around them, and listening to different viewpoints; and
- information accessed from other individuals and organisations working in similar circumstances.

When CSOs engage in sensemaking they normally try to involve as many relevant staff members as possible. This not only ensures that sensemaking exercises produce findings that are as accurate and useful as possible; it also enables staff to benefit from the critical thinking and analysis that sensemaking encourages.

Many CSOs also like to include outsiders in sensemaking activities. These may be '*critical friends*' from other organisations, or people that do not necessarily share the views of CSO staff. This can help to challenge commonly accepted views held by like-minded people. In addition, it is common for CSOs to try and engage targeted beneficiaries in sensemaking activities. Indeed, many participatory M&E exercises are based around sensemaking activities within communities. These are designed partly to help beneficiaries make sense of their own situations, and come to a common understanding.

Although sensemaking can take place in many different situations, it is perhaps most useful in complex situations where change is harder to measure or assess. This can include situations where:

- many actors are involved in a project or programme, which makes it hard to see how any one project, programme or organisation has contributed to change;

- the work being carried out is complex and it is not necessarily clear how success or failure should be judged;
- work has multiple or uncertain goals; or
- goals and objectives are constantly evolving in the light of ongoing experience.

Different types of sensemaking activities

There are many different mechanisms through which sensemaking can take place – far too many to list within this paper. The examples below should therefore be seen as illustrations only. In each case the mechanism provides an opportunity for different actors to discuss issues and come to shared conclusions, based on different perspectives.

- Many International NGOs, including ActionAid, Save the Children and Trocaire, have developed different kinds of stakeholder reviews at country or programme level to supplement formal M&E processes. These reviews typically perform several different functions, but are primarily designed to create the space for staff and other stakeholders to review and analyse information, and openly discuss successes, failures and lessons learned in a safe environment.
- Many agencies facilitate learning workshops to enable different stakeholders to come together to generate, share and record lessons. For example, the World Wildlife Fund (WWF) has often used learning workshops as a formal way of capturing learning, as an alternative to writing up lessons learned. The workshops often include video interviews with different individuals and groups (see Britton 2005).
- Communities of Practice can include individuals from within organisations, or across different organisations, who come together to discuss areas of common interest. Communities of practice often draw on formal M&E information generated by different organisations.
- Most projects or programmes have regular team meetings, during which M&E information is shared, analysed and discussed with a view to informing decision-making.
- One way of conducting sensemaking in some situations is to develop an impact grid. An impact grid is a tool that allows stakeholders involved in a project, programme or organisation to analyse multiple changes by mapping those changes onto a grid. Impact grids can help make sense of multiple changes to which an organisation contributes. They are covered in a separate paper within the M&E Universe.

Of course there are many other ways in which sensemaking can take place, including workshops, conferences, board meetings, staff retreats and field visits, as well as formal M&E exercises such as reviews, evaluations and impact assessments. However, sensemaking mechanisms do not always need to be designed from a blank sheet of paper. A paper by Young et.al. (2014) suggests it is important to start by looking at what people are already doing – in other words to look at where spaces already exist for sensemaking – and then strengthen and explore these.

Finally, it is generally agreed that much of the good learning and sensemaking that occurs within CSOs comes through informal discussions in places such as kitchens, cafes, bars, gardens or even bathrooms. These are often considered *'safe'* places where people can be honest about what they think, rather than feeling constrained within a formal setting.

Questions used in sensemaking

Sensemaking activities may be informal and unstructured, but they may also be formally facilitated. When facilitated, they are often based around a set of questions designed to stimulate thoughts, and gather and analyse multiple perspectives. Some of the sensemaking questions INTRAC has found useful in the past for M&E purposes are contained in the box below. INTRAC recommends using no more than 5-7 questions in any sensemaking session.

Questions to ask when facilitating M&E sensemaking sessions

- What changes has your project or programme helped bring about? Why are they important, and what made them happen?
- What have you achieved that you are most (or least) proud of, and why?
- How have changes affected different groups that your project or programme works with?
- Are you still on track to deliver your objectives, and are they still the right objectives?
- What work was planned but not done, and why?
- What negative or unexpected changes have been brought about through your project or programme?
- Are there expected changes that have not happened? If so, why have they not happened?
- Which problems have been encountered and how (if at all) have they been overcome?
- Based on your experiences in this project or programme, what advice would you give to someone starting a similar project or programme elsewhere?
- If you were starting this project or programme again, what (if anything) would you do differently?
- What do you think you need to do differently in the future, based on your shared understanding of what has happened in the past?
- What do you think others should do differently?
- How has the external political or socio-economic situation changed? How should your project or programme change as a result?
- What further evidence or information do you need to produce to make future decisions?

A case study showing how one organisation has developed a sensemaking mechanism as part of its M&E system is contained in the box on the following page.

Case study: Transparency International Defence and Security Programme (TI-DSP)

TI-DSP runs a worldwide programme dedicated to reducing corruption in the defence and security sectors. It developed a process called MEKANIC to maximise the learning from its programme, and to make sense of how it is impacting corruption in the defence and security sectors worldwide.

The heart of MEKANIC is an all-day learning meeting every three months. It usually comprises 10-15 people, including TI-DSP staff, senior advisers, and external people who have deep knowledge of the sectors from widely different perspectives. In the past this has included defence ministry officials, defence ministers, defence company officials, defence journalists, academics and members of other TI Chapters worldwide. TI-DSP included them in the process to open itself up to constructive external criticism, not only from within the programme and the TI movement, but also from other experts working in the sectors. MEKANIC meetings consist of an intensive review of a selection of projects and interventions, plus analyses of the defence and security sectors. Some of the key processes used within the review meetings are listed below.

- Performance indicators used to report to donors are reviewed. A selection (3-6) of these indicators are reviewed in detail.
- Projects or programmes that have been formally evaluated are reviewed in-depth.
- TI-DSP tries to establish what it thinks the current or potential impact of selected projects or campaigns are, based on the expertise of the participants round the table.
- Topics relating to corruption in defence and security are discussed, and TI-DSP tries to identify what other interventions or research would best advance anti-corruption in the sector. These discussions may lead to new ideas of how TI-DSP might have more impact
- TI-DSP regularly collates comments and feedback in a series of scrapbooks which feature quotes, photos, etc. for each of TI-DSP's work streams. Every 6-9 months, TI-DSP identifies the key messages and themes arising from the totality of the scrapbooks. TI-DSP then asks the external MEKANIC attendees for affirmation on what TI-DSP has (or has not) achieved.
- A substantial part of each MEKANIC meeting is devoted to discussing how TI-DSP thinks it is having influence, and how it can leverage or increase it.

TI-DSP describes MEKANIC as the central meeting event and strategic learning tool of its programme. It believes the combination of serious, in-depth discussions of TI-DSP's learning and experiences, kept honest and stimulated by the presence of outsiders, and the strategy-making that comes out of these discussions, has proved to be immensely creative.

Source: TI-DSP (2013)

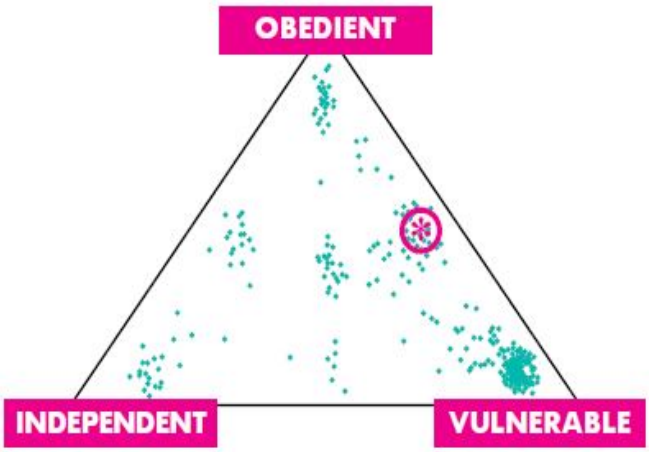
Sensemaking software

There is a growing range of software designed to help people to make sense of information in complex situations. The best known of these in the CSO world at present is SenseMaker®. SenseMaker® is a software tool that helps find patterns among stories. It works by asking the people providing the stories to rate them according to different criteria. The ratings can then be visualised and analysed in different ways.

For example, Girl Hub used SenseMaker® software in a programme in Rwanda to generate girl-centred evidence (GirlHub 2014). Girls were asked to share a true story about an experience in a girl's life. They were then asked to rate the story against different dimensions, for example:

- the extent to which the girl was obedient, independent or vulnerable;
- the extent to which the girl was conforming or confronting tradition; and
- the extent to which the girl wanted/didn't want to do something, and then did/didn't do it.

Once the information has been put into a database the software can then produce graphs and diagrams to help make sense of all the multiple stories. For example, the diagram below shows how the stories in Rwanda were distributed in terms of obedience, independence and vulnerability, with a link to a specific story, shown below the diagram (ibid, p2).



LACK OF KNOWLEDGE

She was 14 years old and she was born and raised in a rural area. She was a student but her father agreed to give her to an old man through marriage. The girl was a clever student. She didn't know that it was her wedding. Even when she asked her parents about the preparations they were making, they told her it was some occasion. She suspected that it was something big. She went to school knowing that she was going to be married. She told her friend, whom she loved and trusted. Her friends brought the police and her teacher also advised the family. Then the family agreed to stop the wedding. So the girl was very happy and her friends were also happy.
The girl continued her education.

Girl Hub has used the analysis and findings from the methodology to revise its programme and advocacy approaches, and to prioritise addressing violence against girls in Rwanda.

As yet, most of the examples of applications of the SenseMaker® tool have been concerned with researching and understanding situations from the point of view of different stakeholders. However, there is clearly more potential for using this kind of software within M&E to analyse the changes resulting from projects and programmes, particularly those operating in complex and challenging environments.

Further reading and resources

Two other M&E Universe papers relevant to this paper focus on impact grids and triangulation respectively.

Impact grids

Triangulation

More information on the SenseMaker® tool can be found at the website http://cognitive-edge.com/sensemaker/. Note, however, that the software is not free and requires a licence. A practical example of how the software has been used is contained in the publication produced by Girl Hub (2014) referenced below.

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INTRAC is a not-for-profit organisation that builds the skills and knowledge of civil society organisations to be more effective in addressing poverty and inequality. Since 1992 INTRAC has provided specialist support in monitoring and evaluation, working with people to develop their own M&E approaches and tools, based on their needs. We encourage appropriate and practical M&E, based on understanding what works in different contexts.