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Using Sensemaker to measure, learn and communicate about smallholder farmer inclusion

Case Report

Thematic learning programme on planning, monitoring and evaluation of complex processes of social change

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A better
deal for
farmers

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Using Sensemaker to measure, learn and communicate about smallholder farmer inclusion

1. Preparation of the Sensemaker pilot

Introduction

The Belgian NGO Vredeseilanden (VECO) aims to contribute to viable livelihoods for organised family farmers through improved income from sustainable agriculture, with a particular focus on value chain development. VECO operates in 8 regions including 15 countries in Central and South America, Africa and Asia.

Value chain development is a complex process in which relationships, dynamics and mechanisms can never be fully understood. Different actors (chain actors, chain influencers and chain supporters) and factors (government policies, environmental aspects, market dynamics, trends ...) interact and influence the (desired) outcomes of the farmer/producer organisation capacity development process, concrete developments in the value chain, and changes in the livelihoods of small-scale farmers.

As such, value chain development requires a programme planning, monitoring and management approach which allows VECO and its partners to understand the complex process in which they are engaged, in order to develop relevant intervention strategies.

In 2007, VECO changed its approach to programme design from a Logical Framework Analysis (LFA) approach to one based on Outcome Mapping. Following from this, over the last three years, it has developed a learning-oriented M&E system that provides a framework for

systematic data collection, sense-making and documentation which better supports VECO's planning and management process, facilitates organisational and institutional learning, and fulfils VECO's accountability requirements. Hence, the name Planning, Learning and Accountability system (PLAs).

From 2010 to 2012, VECO was involved, together with ten Dutch development NGOs, in the PSO-facilitated 'Thematic Learning Programme (TLP) on Planning, Monitoring and Evaluation of Complex Processes of Social Change'. In this context, VECO conducted action research to investigate the potential use of Sensemaker as a planning, monitoring and evaluation (PME) method within its chain development programmes.

Sensemaker is a relatively new method which has been mainly applied in the corporate or public sector. A common understanding and experience of its use within the development sector is therefore almost non-existent. Sensemaker also entails a different design logic and a substantial investment in the use of a software package developed by Cognitive Edge. For these reasons, it was decided that the research would start off with an exploratory phase.

Through this preliminary exploration, which was initiated in January 2011, it became clear that Sensemaker would not be suitable for monitoring and/or assessing the impacts of VECO's value chain development programmes. However, in July 2011, the idea to use Sensemaker was taken up again in the frame of the Global Learning Initiative on Inclusive Modern Markets (GLIMM), for reasons which will be explained below.

Sensemaker

Sensemaker is in essence a pattern detection software that comes with a methodology, which relies on the use of a large number of fragmented micro-narratives to make sense of complex realities, to distil patterns, and then respond to the patterns in a timely manner.

It is built on the idea that people use fragmented material to make sense of the world around them. The 'fragments' concerned may be transcribed or spoken narratives, in any language or dialect, or video-clips, photographs, and so on. The stories which are collected are not large stories, constructed to explain or communicate a point, but micro-narratives, which are used as a means of disclosure.

Through probing questions, respondents are asked to tell a specific anecdote or short story. These stories are then self-signified or self-indexed against a set of pre-defined topics of interest (signification framework). This implies that the respondents themselves make the primary qualitative/quantitative assessment of their own stories.

In other words, the person who provides the material decides what it means, resulting in a so-called 'self-signified micro-narrative'. People not only interpret the content of their stories, but also add deeper layers of meaning to them in the process of signifying them.

Thus, Sensemaker can be used as a method to reveal the world through the eyes of beneficiaries of a programme or important actors linked to the programme. It provides a powerful, natural and intuitive way to gain access to multiple perspectives of, and new insights into, complex systems. By using a large number of fragments from a diverse range of actors, it allows one to identify patterns around pre-defined topics of interest.

Once interesting patterns have been identified, people can read specific stories related to each pattern and use this information to further interpret and act upon it. Sensemaker removes the need for intermediaries to interpret and analyse data, since it allows the original material to be easily accessed in a variety of forms by the managers and decision-makers involved in a particular programme.

The main advantages and innovative aspects of Sensemaker can be summarised as follows:

- It provides a quick analysis of qualitative material and helps a programme to make sense of distributed (fragmented) information from multiple sources and interactions;
- It assists in understanding change as it emerges and making real-time adjustments (> quick feedback, rapid responsiveness);
- It can provide insights into the different perspectives, attitudes, and values of different actors around a set of pre-identified domains of interest;
- It can be used as a means of weak-signal detection, i.e., the detection of hidden and/or emergent opportunities/threats;
- It generates evidence-based 'hard' and 'soft' data.

Exploration phase

Initially, VECO's interest was caught by two features of Sensemaker that resonate with two M&E challenges:

- Firstly, VECO acknowledges that it is operating in complex settings and that facilitating value chain interventions is highly unpredictable and cannot always be planned for in a linear way. Sensemaker is one of the few hands-on methods that is specifically designed to monitor/assess complex processes.
- Secondly, VECO is still looking for ways to get a better understanding of smallholder farmer inclusion in value chain development, which is, in essence, an aspect of the relationships between important chain actors, such as farmers/farmer organisations and companies (processors, manufacturers, buyers, supermarkets ...), and how these relationships evolve over time.

Since the application of Sensemaker is almost non-existent in the development sector, it was decided that an exploratory phase was necessary before carrying out a pilot test of its use for one or two value chains in one of the VECO programmes.

This phase was guided by the central question: To what extent can Sensemaker be used and useful for VECO and its partners to support and improve their value chain development interventions?

There were two practical sub-questions:

1. How is an approach to assessment/monitoring using Sensemaker to be practically designed (prompts, signifiers, domains of interest, filters,, steps, process, design decisions)?
2. What are the practical consequences entailed for a middle-sized NGO such as VECO and farmer organisations to operationalise Sensemaker (costs, time, labour, expertise required for design, collection of micro-narrative fragments, software 'use'/design, analysis, use of results; and compatibility with existing M&E processes ...)?

During this phase (from January 2011 till July 2011), VECO staff got acquainted with the theory and practice of Sensemaker and investigated its possible uses and benefits for VECO's programme, taking into account the realities of the programme, and its compatibility with the existing chain intervention framework (i.e. VECO's Outcome Mapping-based intentional design framework, impact assessment framework and PLAs).

The exploration phase consisted of a literature review, two workshops, internal review/reflection moments, and consultation with external chain and Sensemaker experts. A primary investment was made in understanding the methodology.

One internal person was familiar with Sensemaker through an external training (given by Cognitive Edge), and another had learned the basics of Sensemaker through a half-day seminar. In order to get a more widespread understanding among the staff, a workshop was held for 15 people from different sections of the organisation. It was facilitated by an external consultant who had previous experience in designing and using Sensemaker in the development sector (for Global Giving).

This introduction workshop was successful in improving the understanding of the different dimensions of Sensemaker, but also generated a lot of questions and doubts about the use of the method and the amount of work required to implement it.

Two key criteria for potential use emerged from the workshop and were later confirmed by the management team:

- The application of Sensemaker must be compatible with the current PLA system and existing information needs (and in the best case, replace other M&E processes);
- The use of Sensemaker should provide information that is not yet available and is crucial for understanding changes that can inform future interventions (by VECO, partner organisations or other chain actors).

It was decided that the exploratory phase would be taken up further by a small team at head office. A first review by this team resulted in some initial ideas about how Sensemaker could bring an added value within the existing PLA system, especially regarding its potential relevance for the monitoring and/or assessment of the impacts of its value chain development programmes. Yet increasingly more doubts were raised about the usefulness of Sensemaker.

This was based on the awareness that although Sensemaker could potentially provide interesting information and insights in relation to impact measurement, it would be an additional burden on the existing PLAs, and would not replace existing M&E methods.

Furthermore, it was observed and spelled out by some staff that VECO had already invested quite some energy in improving its M&E system (by adopting aspects of Outcome Mapping, a learning-oriented

practice focusing on reflection, debate and analysis with partners, a new chain intervention logic ...) and that a new, rather complex method might make the PLAs heavier and would demand too much energy.

In sum, the idea of experimenting with a new method without foreseeing how it could be integrated into the PLAs generated a feeling of limited ownership and provided little motivation for the staff to further explore the use of Sensemaker. This was also reinforced by the fact that there is to date no evidence in the development sector to 'prove' that the method works and has relevance for a programme such as VECO's.

Sensemaker for inclusive modern markets

In July 2011, rather unexpectedly, the opportunity to take a second look at Sensemaker arose within the Global Learning Initiative on Inclusive Modern Markets (GLIMM). The aim of this learning programme is multi-faceted: it is in essence a systematic documentation and learning process related to cases (value chains) in the VECO programme in which products from small-scale farmers are sold to local, regional or international modern markets.

It was felt that it could be particularly interesting to use Sensemaker to investigate the degree of inclusion of smallholder farmers in these value chains, specifically with respect to how ownership, voice, risk and reward are shared among the different chain actors.

For monitoring purposes, it could be equally interesting to feed the outcomes of the Sensemaker process back to the local chain actors and chain intervention programme. Thus, aside from informing the documentation and learning process at global level, it would also be directly relevant and useful to specific chains in which VECO is



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intervening, and the results would be incorporated into and used within the respective PLAs.

Some data related to changes in the inclusion of smallholder farmers are less tangible and therefore less straightforward to collect than others. Sensemaker seemed to be a good method to capture insights on these less tangible aspects of inclusion, seen through the eyes of particular groups of respondents (farmers/producers, processors, buyers, traders, consumers, chain supporters such as NGOs – including VECO, business development service providers, or chain influencers such as local and national governments, trade organisations ...).

This became the subject of the pilot project undertaken within the frame of the Thematic Learning Programme (TLP). The aim was to investigate whether a generic application of Sensemaker could be developed and used – in combination with hard data – to ‘assess’ value chains with a particular focus on their inclusiveness of smallholder farmers.

The use of Sensemaker in this case had a double function. It could be seen as an alternative data generation method for the description of the cases within the GLIMM (to provide much richer data through stories). Furthermore, the insights that were generated regarding voice, ownership, risks, and rewards would be useful additional information that could be shared and discussed among the chain actors in the respective multi-actor chain meetings.

It was expected that the insights generated about these dimensions of the trade relationship would either confirm common perceptions, or reveal new insights that could be further explored, thus leading to improved or more focused chain interventions (by VECO, the farmer organisations and the private companies).

In order to be useful and to be used, the generic framework would have to be simple and based on a limited number of key parameters to assess inclusiveness and how progress towards greater inclusiveness is made.

Since the piloting of Sensemaker was part of the PSO-supported TLP, an action research plan was developed, guided by a general research question and four collective sub-questions (shared by all participating organisations of the TLP), along with two organisational sub-questions (specific to VECO’s context).

General research question:

To what extent can Sensemaker be used and useful for measuring the inclusion of small-scale farmers in modern market chains, in order to improve the support interventions in the respective value chains?

Collective and organisational sub-questions:

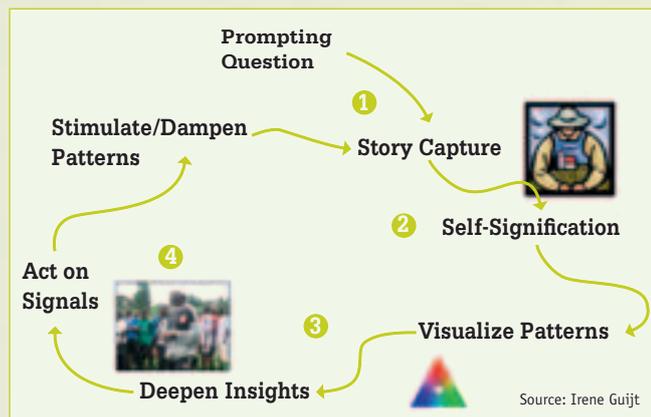
1. How does the Planning, Monitoring and Evaluation (PME) approach help to clarify the relationships, roles and expectations of the actors involved in the intervention?
2. How does the PME approach contribute to learning about the progress towards the development objectives (of the programme, partner organisations, partner networks, Northern NGOs)?
3. How does the PME approach contribute to the satisfaction of downward and upward accountability needs?
4. How does the PME approach contribute to strengthening the internal adaptive capacity of the programme, partner organisations, partner networks, and/or Northern NGOs?

Including: To what extent does Sensemaker unpack and reveal dimensions of the inclusion of small-scale farmers within value chains?

Including: How can the outcomes generated by Sensemaker be further analysed within a multi-actor setting in order to influence future chain interventions?

2. Sensemaker design and planning

The various steps of the Sensemaker process are visualised in the graph below. Ideally all these steps need to be planned for before the actual implementation starts. However, during this action research it turned out that due to lack of prior experience with Sensemaker, it was difficult to plan the analysis and use of the results in advance. Now that a full Sensemaker cycle has been finalised, and keeping in mind VECO's capacities and organisational rhythms, it will be easier to draft a realistic plan for all steps.



The most important steps of the plan for the pilot Sensemaker application were:

1. Selection of the cases;
2. Selection of the domain and topics of interest;
3. Development of a relevant and useful signification framework;
4. Planning for the story collection process;
5. Developing the COLLECTOR® application.

Selection of the cases

Two cases which are part of the GLIMM were chosen for the Sensemaker pilot:

- Banana chips chain in South Ecuador
- Tea chain in North Vietnam

These two value chains were deemed interesting for testing Sensemaker as they are quite different in nature. Both involve smallholder producers who are organised into producer organisations/cooperatives which sell their produce to a private company that sources from them. However, they differ in context, product, geographical scope, complexity, type of farmer organisation, type of buyer and market.

The plantain banana is grown in three departments of the Sierra region of South Ecuador (Chinipe Zamora, Palanda and Zumba). Geographically, these departments are located far from each other. The plantain is collected from the production areas by a farmer

cooperative, a second-level farmer association based in Loja, and transported to Guayaquil (West Ecuador) where it is processed into banana chips. The Fair Trade certified banana chips are then sold to a French buyer. The final product can be found in French and Belgian supermarkets.



The tea is produced in Yen Lap, a district north of Hanoi, Vietnam, by a group of farmers who live in the same area and have just started up a cooperative. The tea is collected and bought by a local tea processing company, and sold in the Vietnamese market.



Both VECO Vietnam and VECO Ecuador were very open to this action research and committed to provide finances and staff time to the project, as an opportunity to better understand the realities of their relatively new value chain interventions.

Selection of the domains and topics of interest

Since the focus of the Sensemaker project was to better understand the inclusion of smallholder farmers in modern markets, we needed to clarify and agree on the key elements and characteristics (domains and topics of interest) we wanted to investigate, in order to gather information that would give us insights on inclusive modern markets and could potentially inform chain actors to improve practice. At this stage it was crucial to consider which information needs were essential, useful and relevant, and for whom.

Ideally this selection process should have been done together with the farmer leaders, private company staff and other service providers. However, in this pilot project, we identified the key elements based on literature, the guidelines of the GLIMM and our own experience in working with value chains. The team that discussed and decided on the key domains and topics of interest included both



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head office and local VECO staff (staff working on value chain programmes, advocacy and private sector cooperation).

In general, the exercise was based on the premise that degree of inclusiveness of a value chain can be measured by the extent to which ownership, voice, risk and reward are shared and distributed among the chain actors. Those were the four domains of interest, defined as follows:

1. Ownership: of the business (equity shares), and of key project assets, such as land and processing facilities.
2. Voice: the ability to influence key business decisions, including weight in decision-making, arrangements for review and grievance, and mechanisms for dealing with asymmetries in information access.
3. Risk: including commercial (i.e. production, supply and market) risk, but also wider risks such as political and reputational risks.
4. Reward: the sharing of economic costs and benefits, including price-setting and finance arrangements.

More concretely, the team narrowed the four domains to a set of more specific topics of interest, as reflected in the table below.

Domains of interest 'inclusive modern markets'	Specific topics of interest <i>What exactly do we want to know?</i>
Ownership	<ul style="list-style-type: none"> - Do farmers feel that their contribution is reflected in the end product? - Do farmers and other chain actors feel that the value chain is a 'common project'? - Are the actors co-owners of the value chain (visibility)? Which aspects/stages of the chain? - In which chain activities do the actors participate? Which actors participate in chain management?
Voice	<ul style="list-style-type: none"> - Ability to influence business decisions (price, conditions, quality, risks, access to information ...)? - Power/position of the farmers and chain actors? - Interchangeability and indispensability of farmers? - Ability to influence enabling environment?
Risks	How is risk (price, weather conditions, sourcing, reputation ...) distributed? Is it equally distributed across the value chain?
Rewards	Is there an equal distribution of costs and benefits?

During the discussions it became clear that the selected elements should assist in characterising the relationship between farmer organisations and companies. It was decided not to focus on the potential positive outcomes/impacts of inclusiveness, such as more sustainable practices or increased income. In other words, the elements and the signification framework following from these elements were not to be developed with evaluative questions in mind.

The idea was to show the reality through the eyes of the storytellers, and to illustrate the situation as it was ('to hold a mirror to the actors'). It was not to attribute causal links between the VECO programme and changes in the chain, because of the danger of drifting away from the purpose by being too VECO-centred, and twisting the Sensemaker framework to suit a more programmatic logic rather than measuring and understanding the inclusiveness of the value chain itself.

Once the topics of interest were identified, a signification framework could be developed. This was initially done by the same team and then validated and pre-tested by VECO staff (in Vietnam and Ecuador), one external private company, and 18 head office staff.

The prompting question

The first thing to do in developing a Sensemaker signification framework is to formulate an interesting/appealing prompting question that triggers people to tell a story they find meaningful. Typical prompting questions are formulated as follows: 'What specific moment or event made you feel discouraged or hopeful about ...?' or 'Imagine that you are meeting a colleague. What would you tell her to motivate or discourage her to ...?'

The step of defining the prompting question goes hand in hand with the identification of potential storytellers, that is, to compile a list of all the groups of people whose stories you will seek. In VECO's case, we identified three types of storytellers:

1. Farmers (including farmer leaders);
2. Staff of private companies;
3. Other affiliates (government staff, service providers, other chain supporters and influencers ...).



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Normally a prompting question is used for all people from whom you collect stories. In the case of the VECO pilot, the question was slightly adjusted depending on the type of storyteller.

For farmers: Think about the agricultural value chain in which you are actively involved. Think of a specific moment or event when you felt particularly encouraged or concerned about producing tea/plantain and selling it to the company/buyer?

Please describe what happened briefly. Who was involved? Why did it happen?

For private companies: Think about the agricultural value chain in which you are actively involved. Think of one specific moment or event when you felt particularly encouraged or concerned about investing in and buying tea/plantain/other products from small-holder farmers? Please describe what happened briefly. Who was involved? Why did it happen?

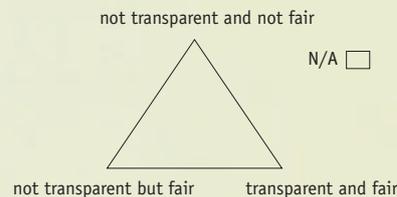
For other affiliates (government, VECO, researchers, other service providers ...): Think about the agricultural value chain that you are supporting and actively involved in. Think of one specific moment or event when you felt particularly encouraged or concerned about the inclusion of smallholder farmers producing tea/plantain/other products and selling them to companies? Please describe what happened briefly. Who was involved? Why did it happen?

Developing relevant signifiers and modifiers

Based on the topics of interest, signifiers and modifiers were then developed following the Sensemaker guidelines, in the form of triads and dyads of relevant variables, as well as multi-choice questions.

Triads

In your story, price setting is ...



Three variables constitute the points of the triangle. These are evenly balanced labels: positive, negative, or neutral, with the centre of the triangle representing a balance with all three being equally present. The storyteller marks a spot in the triangle to indicate how the story relates to each of the three labels.

Dyads

In your story, farmers ...



Dyads or polarities are useful to construct patterns in relation to a certain quality, issue or result. It is a sliding scale between two extremes, one of excess, the other of deficiency. The ideal situation – e.g., a certain desirable behaviour or impact – lies in the middle. A specific value, such as trust or ownership, would be suitable for a dyad. But a dyad could also relate to degrees of success or failure.

Multi-choice questions (MCQs)

This story makes you feel ... (pick up to 2)

- | | |
|--|--------------------------------------|
| <input type="checkbox"/> proud | <input type="checkbox"/> indifferent |
| <input type="checkbox"/> angry | <input type="checkbox"/> sad |
| <input type="checkbox"/> hopeful | <input type="checkbox"/> happy |
| <input type="checkbox"/> frustrated/disappointed | <input type="checkbox"/> worried |
| <input type="checkbox"/> surprised | <input type="checkbox"/> determined |
| <input type="checkbox"/> don't know | |

MCQs allow for secondary analysis of patterns in the stories. Basic demographic information on the storyteller and story is essential to include here (e.g. age, gender, story location, whether it is a personal story or one heard from someone else). But multi-choice questions can also include thematic options.

The use of triads and dyads provides ways for people to give additional meaning to their stories and so, they are called 'signifiers'. They are very different from the types of question commonly used in evaluations and they are unique to Sensemaker. The multi-choice questions are referred to as 'modifiers' and can help to create comparisons.

Although the prompting question was slightly different for each type of storyteller, the signification framework was identical for all storytellers, that is, they were all signifying their story against the same framework.



Some important lessons in developing the signifiers and modifiers

- Although the topics of interest are clear, it is not so straightforward to translate them into signifiers (triads and dyads). This is mainly because this kind of question is quite different from conventional survey questions.
- Dyads and triads are useful to construct patterns in relation to certain values, qualities, issues, and less useful to generate answers to specific questions.
- Ideally all the questions need to refer or should be linked directly to the story. In a few instances the questions invite a general opinion on the topic that might not be directly covered within the story. During the signification, storytellers are encouraged to answer those types of questions within the context of the story. For those questions where it is foreseen that answers may not be directly covered in the stories, phrases like 'related to your story ...' can be used instead of 'in your story ...'.
- Developing a signification framework takes time: it is a rather long and cyclical process of trying out different combinations

based on the topics of interest, discovering interesting new combinations, using/modifying triads and dyads commonly used in other frameworks, finding a good combination of triads, dyads and multiple choice questions, and constantly cross-checking whether the questions reflect the essential topics of interests. In addition, it is recommended to do an 'idiot's' test and a pilot test with a limited group of respondents.

- Based on our experience, it is difficult to develop signifiers and modifiers through a group process. One can use groups to brainstorm different ideas and combinations, but it seems to be most efficient to develop signifiers with a few people and then ask other individuals for feedback or do group reviews.
- One interesting method to review the signification framework is to print out all the dyads and triads, stick them to the wall and verify whether all the topics of interest are covered. Once they are on the wall, it is also easier to discuss them as well as to make revisions together.

Some insights that emerged after the story capture and analysis steps:

- The less triads and dyads there are, the easier and more focused the analysis part will be. It is important to be very focused and come up with triads and dyads that reflect the essentials of what you want to investigate.
- MCQs are crucial to make comparisons with the results that emerge through the dyads and triads. So, during the design of the dyads and triads (which should be seen as the core questions), it is important to cross-check how they could be combined with relevant MCQs.
- It is important before finalising the signification framework that the team/users are clear on the overall analysis questions they would like to see answered through Sensemaker. This helps to cross-check the relevance of the signifiers and modifiers, as well as to focus the analysis later on (see below).



Pre-testing the signification framework

The signification framework was pre-tested in two stages:

Idiot's test (December 2011)

After the first draft version of the signification framework was compiled, 18 head office staff who were not involved at all in the Sensemaker project were invited to place themselves in the role of

a farmer or private company actor and to fill out the framework.

The test respondents were asked to detect unclear questions (triads, dyads or MCQs), irrelevant questions or problems with the sequence of questions. This pre-test made it clear that the framework took a rather pro-farmer bias (based on literature and our own background/experience, which are pro-farmer biased). If the Sensemaker approach was to be used by and relevant for private companies, it should include company perspectives on inclusiveness and questions related to the role of companies. This feedback resulted in some adaptations and additional questions, which were also cross-checked with an external private company in Belgium (not part of the Sensemaker project).

Pre-test (Jan 2012)

Once a revised version of the framework was developed, a full story collection and signification process was carried out with small groups of 10-15 farmers each in Vietnam and Ecuador. A field test template was used to capture comments and feedback from the respondents and organisers. This pre-test revealed important problems with the signification framework related to language (the signification framework was translated into Vietnamese and Spanish), the use of terms, unclear questions, questions that no one answered, etc. (see further analysis in the section on the story collection process below). Both regional offices of VECO indicated they had been sufficiently involved with the pre-testing to ensure it was suitable for use with farmers.

Based on the results from these two tests, and a further internal

review combined with an investigation of other signification frameworks, VECO developed a final signification framework.

Planning for story collection

The pre-test also brought up important recommendations for the actual story capture and signification process:

- A facilitated group story collection with farmers works best and is most efficient. The testing with five individual interviews worked well and provided good long stories but was very time-consuming and is unrealistic if you are aiming for 150 to 200 stories;
- A group size of 30 farmers is manageable (morning sessions work best!);
- The facilitation needs to be well prepared (keep a good structure and pace);
- It is important that people are at ease and that a pleasant atmosphere is created. It should be avoided that people have the feeling that they are participating in an exam or evaluation exercise;
- People need to understand what the purpose is and how this exercise is important to the programme or to the chain's development;
- Incentives are important: per diem, lunch, gift, coffee, interesting activity afterwards ...;

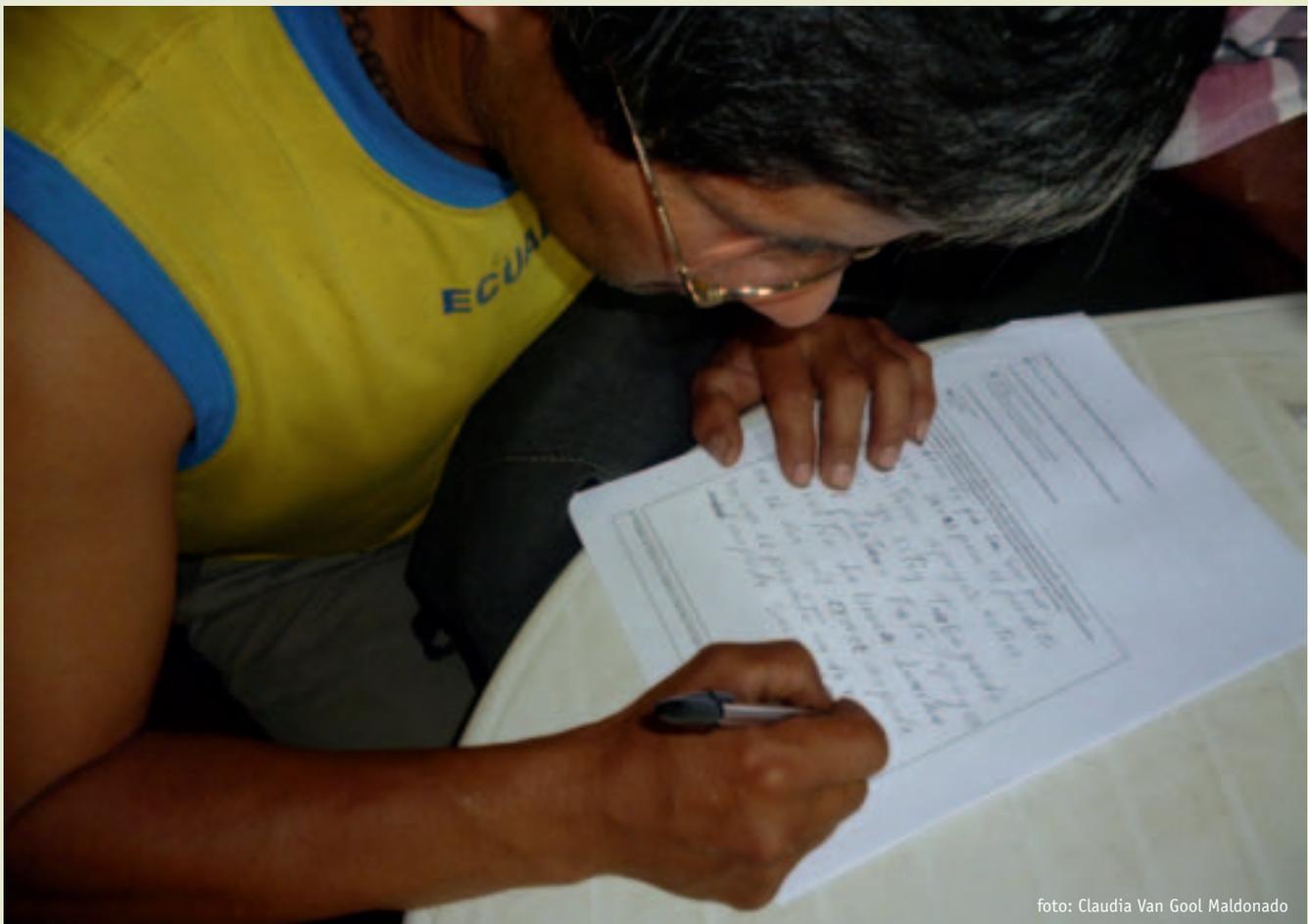


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- The prompting question needs to be explained well as it is not a common question;
- Writing down a story is difficult for some people. Sufficient time needs to be allowed and the focus of the question needs to be clarified. Emphasise the need for legible handwriting, as there were some cases where the handwriting was hardly legible;
- Triads are not common and farmers find it difficult to fully grasp the idea. Therefore a good introduction with clear examples is required. Some fun examples and exercises were used to explain the concept of triads and dyads to the farmers;
- If a question does not directly relate to the story, storytellers are asked to answer the question within the context of the story. If it is not applicable at all, they'll have to indicate NA;
- There are farmers who cannot write or read, so there is need for people to assist them in reading them the questions, writing down their stories and signifying them.

Based on the pre-test and the above recommendations, a preparation sheet to plan for the story collection process was developed, covering the following items:

- Who are the storytellers? Numbers and types of storytellers.
- How will they be invited? How will you communicate the bigger picture in which the story collection is taking place?
- What are the incentives for the storytellers? What's in it for them to participate?
- How will you organise the story capture (via internet or on paper)?
- Where and when will you organise the 'pen & paper' story capture?
- Who will prepare the hard copy signification frameworks (translations, printing ...)?
- How will you facilitate the session (intro, story capture, facilitated signification, closure)?
- Who will transcribe and translate the stories (directly after the story capture)?
- Who will input the stories and signification results into the online Sensemaker Collector application?

For each item, it had to be made clear who was responsible, when it would be carried out, and what the foreseen budget was.

Developing the COLLECTOR® application

Once the signification framework was developed, Cognitive Edge was able to develop a web-based data entry application based on the structure of the signification framework. This was a rather straightforward process, completed within a week's time. The application was tested twice, and some small revisions were required before it could be used for data entry. The total cost for the development of

the COLLECTOR® application was 3000 Euro (including a 20% discount fee for NGOs).

3. Sensemaker in action

Story capture and signification

VECO Ecuador organised two rounds of story capture. The first was organised in the departments of Palanda and Zumba (with 40 farmers in two days) and the second in the department of Zamora Chinchipe (with 35 farmers in two days). In fact, this was only half of the expected number of respondents. The reasons for the low participation were mixed.

The expected number of respondents (150) equals the total number of banana farmers in the farmer cooperative. At the time, there was an institutional crisis at the farmer cooperative, which affected the internal communications to stimulate members to participate in the Sensemaker process. Furthermore, geographical conditions hamper the organisation of big face-to-face meetings; farmers live in remote areas, far from each other (up to 3-4 hours bus rides). During the time of the story collection transportation was also malfunctioning due to bad weather (heavy rains and landslides). The VECO office too is very far from the working area (1 flight plus a 4-8 hour drive). These circumstances heavily affected the story collection process.

The total number of private company staff was also limited, as the buyer is a small company of seven people.

VECO Vietnam organised one round of story capture and reached a total of 144 respondents over a period of five days (the target was 165 people). The reasons for this high turnout were that most of the farmers live relatively close to each other and the VECO team and the farmer organisation are working very closely together at this stage of the programme. This assisted effective and direct communication about this event.

Facilitated story collection

Based on the pre-test, it was decided to go for a facilitated group story collection. It was felt that story collection and signification with farmers living in rural areas would not be possible without a guided process. In both areas, a similar approach to the process of story collection and signification was taken. Farmers and farmer leaders gathered at a central place, and through a facilitated process of around three hours, they each provided a story and signified it. The average number of people per group was 15 to 30 people (sometimes running simultaneously). VECO Ecuador invited the banana chips buyer to do the story collection and signification process directly through the web-based application (COLLECTOR®) provided by Cognitive Edge.

The story collection process needs to be well prepared. The invitation process is crucial to get the right people and a sufficient number of people. In each region, there was a lead facilitator who was supported by two to four assistants (to clarify questions, assist farmers who could not write ...). It is important that the assistants are well prepared, that they know the framework and understand the basics of Sensemaker.



Foto: Hans Manshoven

The following schedule was used to facilitate the story collection sessions:

1. Welcome, purpose of the day, icebreakers;
2. Introducing the method, approach and the particular types of questions;
3. Story writing;
4. Facilitated signification of the stories;
5. Closing activity and incentive.

The purpose, focus and scope of the exercise were carefully explained. It was also necessary to clarify the setting of a value chain, for example, by drawing a flow chart of the specific chain, explaining the different links and actors of the chain. Furthermore, examples and fun exercises were used in explaining the use of the dyads and triads.

The prompting question was explained in plenary. It was emphasised that the story should be a personal experience or moment, something that they had experienced and not a general opinion that they held on the topic. The signification frameworks had been translated into Spanish and Vietnamese. Story collection happened by the 'pen & paper' method. Storytellers wrote their stories in their own language and were normally done within 30 minutes.

The signification process was facilitated in plenary (question by question) with sufficient time for people to indicate their 'scores' on the paper. The assistants were available in the room to help out

wherever that was needed. Especially for farmers, it turned out that this was a crucial factor in the process. Carrying out the full signification process took between 1 and 1.5 hours.

In both regions, farmers received a refund for their transportation costs as well as free coffee and lunch. In Ecuador, incentives did not seem to be sufficient to encourage farmers to overcome transportation and other hindrances. In Vietnam, farmers received a small gift (a small notepad) and a per diem (2 Euro per person) but this was not seen as the main driver for farmers to participate. Although it was perceived as an interesting, new and even fun activity, there were no immediate benefits related to their participation or the potential results of the exercise. Thus, it was difficult at this stage for farmer organisations to see the benefits in participating in this Sensemaker process.

Translation and data entry in Sensemaker COLLECTOR®

For this pilot case of Sensemaker, we chose to use English stories in the Sensemaker database/software. Therefore, there was a necessary added step of translating all stories from Vietnamese and Spanish into English. After translation, one or two people per region (staff and/or outsourced) input all the stories and signification scores into the COLLECTOR® application.

Later in the process, especially for the feedback and use of the stories with farmers and farmer organisations, it was necessary to select and filter out story packs that could be read and analysed by people in their local language. So every story was eventually entered into the system in both English and the original local language, so they could be used by different users.

Pattern seeking

As a first-level analysis, the Sensemaker software is used to draw up and analyse the patterns generated by the significations of the stories. Based on these patterns, one can detect and select story packs linked to specific patterns. As such, at this stage, no stories are read; the focus is solely on pattern detection.

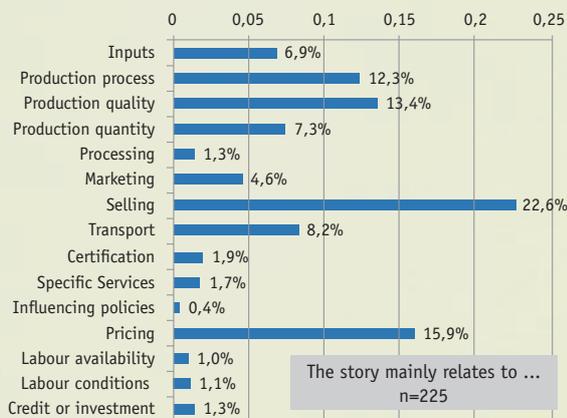
There was no uniform analysis process to follow. A brief investigation of existing practices revealed that approaches ranged from 'browsing through the data', that is, letting the data speak and spotting surprising and interesting patterns, to a full-fledged statistical analysis of the data. The approach chosen depends on the final intended use of the Sensemaker data and the resources (including expertise) available for analysis.

Initially it took time to figure out how to organise/structure the analysis. After getting familiar with the software and its applications, it became more clear which steps were most relevant for the VECO pilot (as well as future use of Sensemaker by VECO):

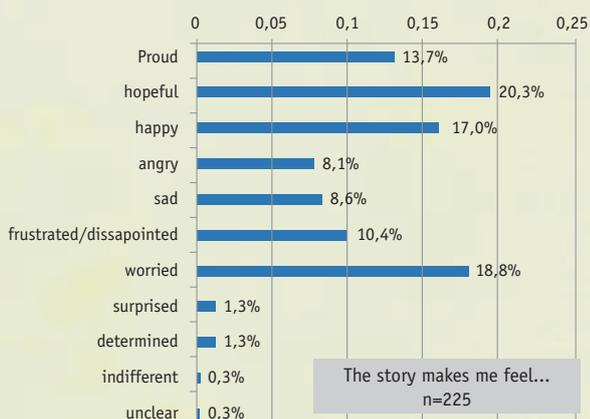
1. Make an overview of the overall perspective (and interesting/surprising aspects) based on the scores of the multi-choice questions. This can already yield some interesting story packs (using the 'BROWSE' and 'COMPARE' functions).

Example: the figures below shows which topics the stories relate to, and which feelings are associated with the stories.

The story relates to ...



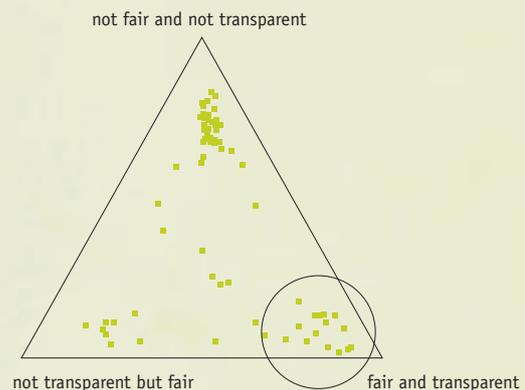
The story makes me feel ...



2. Look at the patterns of each of the triads and dyads found in the signification framework. Try to find interesting/surprising patterns and select story packs. Use extra filters (based on the multi-choice questions such as age, geographical place, emotions ...) to detect additional patterns (using the CLUSTER and DISTRIBUTE functions).

Example: the figure below visualises the stories in the triad 'price setting is not transparent and not fair/not transparent but fair/transparent and fair'. The dominant cluster is 'not transparent and not fair'. However, a quarter of the stories are seen to depict price setting as 'transparent and fair'. One can select these story packs and analyse them further.

In your story, price setting is...



The two steps above can be seen as the basic analysis, and some practitioners argue that this is in many cases sufficient. VECO explored two additional layers of analysis:

3. Look at the design framework and 'play around' with interesting combinations of triads and dyads. For example, put dyads against each other in 2 by 2 quadrant types of figures, or put one variable of a triad against other variables from other triads (using the 'CLUSTER' and 'GRAPH' functions).
4. Put all signifiers (or dyad signifiers against dyad signifiers or the same for triads) in the GRAPH application and look for strong correlations (using the visual or text correlation report). Check out the strongest correlations and figure out what they mean and select interesting related story packs.

The above-mentioned analysis requires good knowledge of the software and its different functions, but in principle it is feasible to organise a good level of basic analysis internal to the organisation (with a limited number of staff). In the case of VECO, five team members were introduced to the software and its various applications during a one-day workshop. Three people at head office carried out some basic analysis, and at the country office level (Vietnam and Ecuador) two people were involved in the analysis. For first-time users, however, assistance from external experts is recommended to enrich the analysis. It is also worthwhile to have a 'naïve analysis' by people who are unfamiliar with the context and the project. VECO opted for both internal and external analysis. VECO did not carry out a statistical analysis (e.g. SPSS).

The analytic results were summarised in a report that presents the general data and an overview of the interesting patterns, including

brief observations/conclusions and selected interesting story-packs.

For VECO, the above-described basic analysis is sufficient to cover current needs, and – in view of sustained use of Sensemaker – can be carried out again in a much shorter time and with limited external support.

Human sense-making

Basically, the human sense-making process involves reading the stories connected to the visually interesting patterns, and ‘making sense’ of those patterns with a group of people, preferably those who are part of the system, implement the work and/or make decisions.

This second-level analysis provides more qualitative insights into the patterns and is linked to the feeding back and use of the results. In the case of the VECO pilot, a face-to-face meeting was organised with a representative group of farmers, the farmer organisation(s), the private company, VECO staff and other supporters.

In order to organise a relevant process, the human sense-making needed to be linked to the purpose of the Sensemaker project:

- Clarify and explore the concept of inclusiveness (against the core themes and in the context of the respective chains) together

with VECO, farmer organisations and companies;

- Check assumptions on (elements of) inclusiveness within the respective chains together with farmers, farmer organisations and companies;
- Identify and discuss possible adjustments to the chain development programme by VECO and farmer organisations.

The initial domains of interest – voice, ownership, risks and rewards – were deemed to be too conceptual to discuss with the farmers. In contrast, it is quite easy for farmers and their organisations to talk about issues related to price, quality, delivery schedules, etc. Therefore, it was decided to organise topical discussion rounds in which a variety of practical issues related to inclusiveness were debated. The suggested topics of interest were:

1. Price setting & quality-standard setting;
2. Delivery and payment schedules (trading agreement issues);
3. Company-farmer cooperation: capacity to engage with each other, quality of the relationship, and loyalty issues.

Before the results from the first-level analysis (patterns) were



foto: Claudia Van Gool Maldonado

presented, participants were asked to indicate what they thought would be the dominant pattern for each of the triads and dyads. In this way, the Sensemaker patterns would either confirm or refute general assumptions on the topics. This on its own generated interesting discussions.

After explaining the Sensemaker patterns, the participants were divided into reading groups to filter out the core messages in the stories related to the respective patterns. Different groups would be reading similar or different story packs. The groups summarised and presented their findings, followed by a plenary discussion of the topic at hand. The sessions were closed with a set of conclusions and suggested recommendations to improve the chain interventions. Finally, the groups went back to the story packs and selected one or two stories that they found powerful, that is, stories they felt expressed the core message of what was discussed in relation to the topic.

After going through the different stages of Sensemaker, it became clear that the human sense-making process is the core of the methodology for use in VECO's programme (and probably any development programme). Although Sensemaker might also be very useful and relevant from a programme management perspective, its real power lies in the feedback loops and opportunities it provides for collective analysis and sense-making by the actors in the system.

Now that the design, story collection and first-level analysis process has been developed and carried out once, it will be easier and more cost-effective to organise in the future. Full attention and main efforts and resources can then be focused on the human sense-making part.

4. Outcomes of the Sensemaker pilot

This section is structured around the collective learning questions of the PSO-supported Thematic Learning Programme mentioned above.

Clarifying relationships, roles and expectations

How does the PME approach help to clarify relationships, roles and expectations of the actors involved in the intervention?

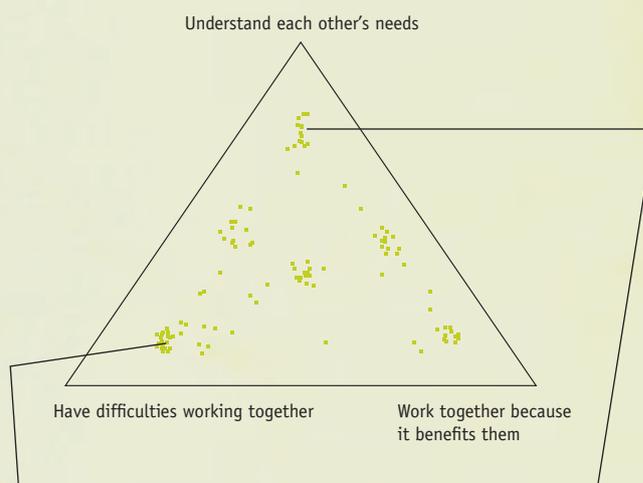
Sensemaker did not clarify relationships, roles and expectations between the VECO programme team and its programme partners (farmer organisations, NGO's ...) as it was not designed for this purpose. The focus of the Sensemaker project was on the inclusion of smallholder farmers within modern markets, which is in essence a relational aspect of value chain development. It is integrated (implicitly or explicitly) into the signification framework that was used to signify the stories. In this way, Sensemaker revealed patterns related to inclusiveness (price setting, quality standard setting, risks, payment schedules, capacities ...). In other words, it brought up important relational issues between key chain actors, in particular, the farmer(s) (organisations) and private companies. Furthermore, the patterns were not generated by external people who interpreted the stories but are a direct reflection of the perceptions of the storytellers themselves, namely, chain actors, supporters and influencers.

EXAMPLE: Relationship between companies and farmers

There is a spread of data across this triad that shows the variety of participants' experiences. The most dominant cluster of stories (left corner) shows a perception that there are difficulties in working together. Analysis of those stories shows that the difficult relationship is mainly related to the strong fluctuation in the prices set by the company. The story pack related to 'understanding each others' needs' is dominated by examples of the company offering training and support services to partners.

Tea, Vietnam

In your story, companies and farmers ...



'On November 17, 2011, I attended a training about pruning techniques held by the tea company. I learnt about how best to prune tea and applied this on my plantation. Several days later, the tea company staff visited my plantation to check my pruning method. She praised me, as I had strictly followed the guidelines provided, so they decided to subsidise 54,000 dong for pruning. I felt very encouraged when the tea company helped my family.'

'We produced tea to sell to the collection team and then this team would buy it to sell to the tea company. The collection team said that they would sell to the tea company at 3,500 dong per kg and pay farmers 3,100 dong per kg. Two days later, the price paid to farmers by the collection team was just 2,800 per kg and three days later, the price was lower, at 2,500 dong per kg. We farmers did not know how to drive a motorbike so we could not transport to sell but relied on the collection team. This story happened in May 2011. Although we got paid at a low price, we still had to sell. We left the tea to grow without reaping it as the money that we got failed to compensate us for our labour.'

EXAMPLE: Loyalty and/or dependency of farmers to the company

For the tea farmers in Vietnam it is obvious that most farmers sell to one company; however, there are 23 significant outlier stories. Reading those stories makes clear to which companies/middlemen they are selling and why (higher prices are paid and/or middlemen collect the tea at the farmers' houses).

For the plantain banana farmers in Ecuador, there is an almost equal distribution between the two ends. Analysing the story packs (e.g.

the 10 stories in the middle) one learns that the farmers prefer to sell their plantains to the company, but in practice sell to anyone in order to avoid loss. When there are no delivery quotas for the company, they sell to the local market.

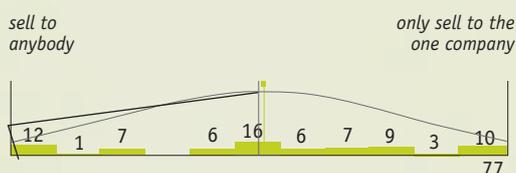
Tea, Vietnam

In your story, farmers ...



Banana Chips, Ecuador

In your story, farmers ...



'My story about plantain production is worrying because the quotas for delivery [to the farmer cooperative] are very distant: every month or two months, whereas we harvest every 14 days. Within these quotas we have to sell to the intermediary at the price he esteems convenient, and we lose. For example, one year ago I lost two hectares of plantain due to these quotas. Another matter is that when we send more than the quotas, they don't pay for the excess, but when we deliver less, they deduct money. When there is a lack of quotas due to the distance to the accessible road, the fruit remains at the farm, hence we lose.'

During the second-level analysis, namely, the human sense-making process with the different actors, these relational issues were spelled out openly and made mutually explicit. When this type of sense-making analysis is embedded in the collective reflection, analysis and decision-making processes of the programme, it will definitely contribute to strengthening the relationships/partnerships among the actors concerned.

Learning about progress towards development objectives

How does the PME approach contribute to learning about the progress towards the development objectives of the programme?

VECO's programme aims to contribute to viable livelihoods for organised smallholder farmers. The empowerment of farmers, by establishing better access to markets, enhancing their capacities to engage in business and improving their (bargaining) position in the trade relationship, is one of the development objectives of the programme. The Sensemaker project on the inclusion of smallholders in modern markets aims, among other studies and analyses, to improve understanding of farmer empowerment through the lens of the inclusiveness of the respective chains. The Sensemaker process revealed clear patterns with respect to the topics of inclusiveness, validated (reinforced and/or questioned) assumptions,

and generated accessible, real-life stories of farmers that provided interesting qualitative data.

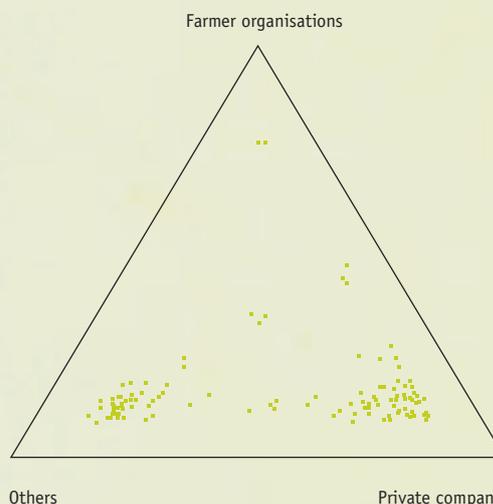
EXAMPLE: Prices paid to farmers

For the tea chain in Vietnam, it is clear that farmers are the least powerful party in price setting. Private companies dominate (in 60 stories) together with other parties (middlemen).

For the banana chips chain, farmer organisations are seen to have substantially more power in price setting as compared to the tea farmer organisation in Vietnam. There are an equal number of stories for both farmer organisations and private companies and a clear cluster of stories balanced between the two. As such, this is a confirming pattern, as the banana chips are a Fair Trade product.

In your story, prices paid to farmers are set by ...

Tea, Vietnam



Banana Chips, Ecuador

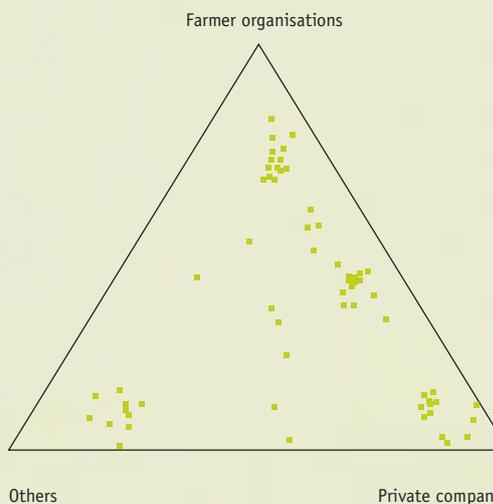




foto: Caroline Huyghe

EXAMPLE: Payment schedules and delivery schedules

Payment schedules seem to be more evenly balanced between farmer organisations and private companies for plantain bananas (Fair Trade product) than they are in the tea chain in Vietnam.

Banana Chips, Ecuador

In your story, payment schedules are set by ...



Tea, Vietnam

In your story, payment schedules are set by ...



Continuous story collection

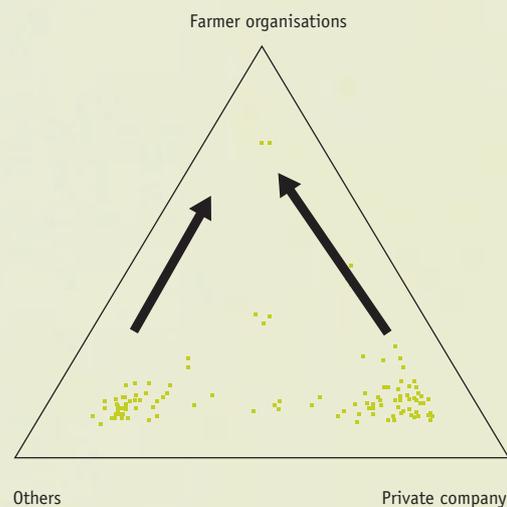
Using Sensemaker in a one-off event generates potentially interesting insights, but its real power for learning about progress lies in continuous story capture. If stories were collected on a regular basis using the same signification framework, one could observe shifting patterns over time, and by analysing/reading through the respective story packs, find out the reasons for the shifting patterns.

As the programme management staff of VECO Vietnam stated: *“Since the farmer groups have just recently formed a cooperative, which might change relationships between farmers and tea company in coming months and years, it would definitely be interesting to capture more stories in 2012 and 2013.”*

For example (see adjoining figures), if increasingly more story clusters were to appear in the direction of the arrows, it would mean

that increasingly more stories were indicating that the prices paid to farmers were being set by farmer organisations, or that the capacities of farmers to engage in business was strong and improving.

In your story, prices paid to farmers are set by ...



In your story, capacity of farmers to engage in business is strong/weak and improving/getting worse

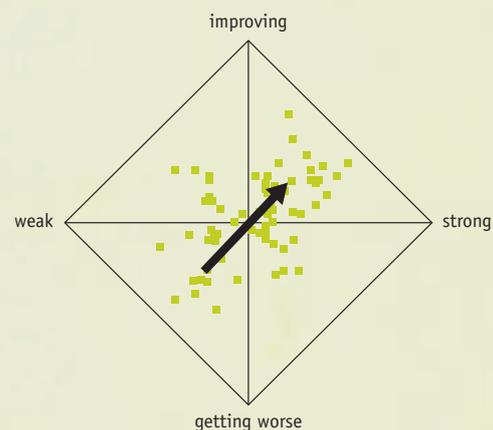




foto: Claudia Van Gool Maldonado

Satisfying downward and upward accountability needs

How does the PME approach contribute to the satisfaction of downward and upward accountability needs?

Upward accountability

Because of its connection and relevance to the 'measurement' of development objectives, Sensemaker is definitely useful for upward accountability purposes (among other data-generating methods).

Sensemaker is a statistically and scientifically-based narrative research method that results in clear patterns that can be presented in reports to provide evidence for or support assessments of programme effectiveness. Stories are signified by the people who wrote the stories, and therefore there is less bias from external interpreters/researchers (as compared to other methods). The visual representations generated by the Sensemaker software are easy to understand, attract people's attention and show clear patterns. If they come with good story packs, they combine quantitative data with qualitative data.

In VECO's case, the results of the Sensemaker process will be integrated into the baseline/impact assessment reports of the respective chains, and recommendations and insights will be incorporated into Chain Intervention Reports (CIRs) and presented in the annual reports to the main donors.

Downward accountability

The patterns that emerged as a result of the Sensemaker process held up a mirror to the chain actors. Based on their stories and the meanings they gave to these stories, patterns around the topics of interest became clear and easy to understand. Through the second-level analysis process (human sense-making) the results were presented and discussed. The participating actors (farmers, farmer organisations, private company staff, chain supports ...) created a further (common) understanding of the functioning of the chain and people's perceptions of key aspect of the chain, leading the discussions towards recommendations for programme adjustments (see

next points). This suggests that if Sensemaker could be applied as a continuous system of story collection and feedback to the chain actors, it could be an important and powerful process for downward accountability.

Two extracts from the reflection journals of the Sensemaker project – compiled by VECO staff – express this point well:

'Participants (farmers, farmer organisations and the private company) were thankful that the findings of the Sensemaker project were brought back 'to the field'. As such, the participants were not surprised by the main findings. Some outliers did surprise them, although rather good explanations were given to explain these patterns. What makes Sensemaker a valuable tool is that value chain actors can anonymously share a story, express their feelings about the chain they are involved in, and interpret the situation. During the feedback session participants felt encouraged by reading stories that reflected their own feelings very well, on the one hand, or stories that were very opposed to their views, on the other. This made participants feel much stronger about expressing how they felt regarding a particular topic/issue, as they felt that they were not alone. In Vietnamese culture it is not easy to express comments/criticism openly, even less so when other actors are involved. The relationship between the tea company and the farmers is very important for success, as indicated clearly through the stories. In the past however, there has not always been a relationship of trust. Bit by bit communication between both parties is improving.' (VECO Vietnam)

'The respondents felt that it was a different way to express themselves because they could do it through the stories. The main problems that were pointed out in the conclusions were topics that had already been touched upon before. In this sense, Sensemaker revealed and confirmed in a very good and clear way the most important issues in the chain. The results not only strengthened and confirmed our previous thoughts but allowed us to analyse them in a more qualitative way, making them more concrete and allowing us to see the relationships between different dimensions.' (VECO Ecuador)

Strengthening internal adaptive capacity

How does the PME approach contribute to strengthening the internal adaptive capacity of the programme, VECO or partner organisation?

In essence, Sensemaker was developed to manage processes in complex situations. Through the patterns that emerge around the topics of interest, programme managers obtain insights that can lead to new interventions to reinforce or dampen the emerging patterns. The second-level analysis (human sense-making) is crucial to this process. In VECO's case, this process was geared towards an analysis of the outcomes generated by Sensemaker within a multi-actor setting in order to influence or adjust chain interventions that could lead to greater inclusion of smallholder farmers.

VECO facilitated a process in which the results (patterns) were presented and discussed with a group of different actors. A set of story packs was selected for surprising or confirming patterns. In different rounds, people read the stories and discussed and filtered out key messages emerging from the stories. In a variety of group discussion sessions, people shared the messages, further discussed them, and came up with possible recommendations for future actions or adjustments.

In Vietnam, this sense-making activity was conducted in the bi-annual monitoring and learning cycle with partners, and the recommendations and conclusions were taken up in the Chain Intervention Report. In Ecuador, the discussion of the results was incorporated into an existing workshop/event of the farmer cooperative and combined with the presentation of a film that illustrated all the stages of the chain.

Both processes were useful and generated interesting discussion

and new ideas. However, it became clear that ideally, it would be important for this sense-making process to be embedded in the programme management cycle, that is, incorporated into the PLA system, for example, as a data collection/generation tool and as an important activity during bi-annual PLA events, and embedded into the reporting system. Again, continuous use of Sensemaker would be necessary to have a more sustained effect within an adaptive management approach.

Example from the tea chain

In Vietnam, the feedback on the Sensemaker results (patterns) and the analysis of the stories generated significant reflection and debate among the farmers, farmer organisation leaders and the company on issues related to price setting and quality standards. The participants, including the staff of the private company, selected two archetype stories that reflected the core message:

'On May 20, 2011, I felt lucky to become a member of our tea group. I remember one day in June, I picked tea to sell to the [tea] company at its gate. The lady buyer of the company said "your tea is not really good, I can pay you only 3,600 dong per kg." I came back and talked to Ms. Tien and she rang the company's lady buyer to inform her that I belonged to the Phu Cuong tea group. One day later, I picked tea and brought it to the company and sold it at a higher price, 3,800 dong a kg. After that, I carried tea to sell there again, and the buyer said that she could pay me only 3,500 per kg. What happened made me sad and I wish that the tea company could have a system to stabilise tea prices for farmers.'

'On August 20, 2011, after a training, my family learnt how to look after tea plants in a better way. Thanks to this, we produced good



foto: Caroline Huyghe



foto: Claudia Van Gool Maldonado

and tender tea that sold at 3,500 dong per kg. When I transported 150 kg of tea to the tea company, the collectors there said, "Your tea is good. You must have picked at the right time and used the correct method." I felt happy as I had been looking after my tea well and picked the tea the right way.'

The meeting was closed with a set of recommendations on the need for a trade contract between the cooperative and the company, further training on tea picking techniques, and a commitment from the company to display the prices at the collection points.

Example from the banana chips chain

The reading and analysis of the stories on payment schedules initiated a discussion between farmers and the farmer organisation (cooperative). Some key issues surfaced related to the division of roles and expectations between grassroots farmer organisations and the cooperative: who is in charge of commercialisation, who delivers to the company, how are payments organised and scheduled, and should there not be a separate management line for plantain (a shadow crop) – e.g., own accounts and capital – instead of combining it with coffee (the main crop)? The following story was chosen as an archetype story for this discussion.

'Basically, we are getting encouraged to produce in order to improve our economy. It seems that this line of work will be very profitable for the farmers, because it lets us avoid being exploited by the intermediaries. With this plant we are all going to benefit, so we can resolve our economic situation. However, we are bothered about the negotiation [with the farmer cooperative], because the trading is not transparent. We would like things to be done with honesty and transparency, so we can work.'

The discussion on payment schedules and delivery schedules – along with the other discussions – ended with some conclusions that are important inputs for future programme interventions to respond to:

it appears that farmers and their grassroots organisations do not always feel part of the cooperative, and the cooperative seems to lack sufficient capacity to negotiate and find new niches (cooperative management issues); a separate management and finance line needs to be developed for banana chips; and there is a lack of information about the market and the chain actors.

5. The use of Sensemaker for a middle-sized NGO

One of the aims of this learning trajectory was to investigate whether it would be feasible to use Sensemaker within the set-up of a middle-sized NGO with limited funds, resources and staff. The most critical remarks on Sensemaker were associated with the fact that Sensemaker is patented by Cognitive Edge (Sensemaker®), which creates a high dependency on Cognitive Edge for the design and analysis process. Furthermore, Sensemaker is complex, rather costly in its implementation, and requires high capacities/support to be properly applied.

Putting Sensemaker into practice

Sensemaker has some particularly unique elements in its structure and approach. Therefore, sufficient reading, training and mentoring are required to fully grasp the logic and finesse of Sensemaker. To make meaningful use of Sensemaker with programme teams and partner organisations, one needs to invest in good introduction sessions that cover the philosophy and practice of Sensemaker. Some external support is recommended at this stage to cross-check whether Sensemaker is indeed a suitable approach for monitoring and evaluation purposes.

To apply the different stages of a Sensemaker process, specific expertise is required and it is highly recommended to bring in external

support. When there are limited funds and resources available, it is important to have a good understanding of the different stages of a Sensemaker process in order to make pragmatic choices about the use, depth and cost-effectiveness of each step of the process. This also entails taking a pragmatic look at the participation of people in the different stages of a Sensemaker process. Full participation is not always necessary or relevant in using Sensemaker. At this stage (mid 2012), users are fully dependent on Cognitive Edge for the customisation of the COLLECTOR® application (for a total cost of 5000 Euro) and the use of the Sensemaker software (200 Euro/month/user). For other forms of support (design, analysis ...), one does not necessarily depend on Cognitive Edge.

Developing a signification framework

Careful formulation of the signification framework (prompting question, triads, dyads and multi-choice questions) is crucial. It requires a good understanding of the particular character of dyads and triads. The signification framework cannot be developed without training and/or external support. It requires a cyclical process of formulation, adaptation, pre-testing and pilot testing that can take from a few weeks to months. During this step, a good level of participation and consultation of different people is recommended. Searching for feedback from experienced Sensemaker practitioners is valuable and not costly. Funds permitting, external facilitation is recommended. Once the signification framework has been well designed and proven useful for the users, no further adjustments are necessary during the rest of the Sensemaker process. The main costs involved for this process are related to staff time, meetings/workshops and external facilitation/support.

Story collection and signification process

VECO organised a 'pen & paper' story writing process through a facilitated group process with an average of 30 people per group. It is evident that full participation of VECO staff, partner organisations

and beneficiaries is necessary in the story writing and signification process. The quality of the story collection depends mainly on the quality of the group facilitation and communication with the community members, and less on the technical expertise of the facilitators. These processes tend to be quite common for development NGOs and do not require high-level external support.

Based on VECO's experience, 30 to 60 stories can be easily captured in one day through a group writing process (with one team in one geographical area). With two collection teams and an efficient facilitation approach, it should be realistic to capture 100 stories per day. This means that up to five days of story collection would be required if one wants to reach 300-500 stories.

VECO also learned that the real challenge for story collection in remote areas is not only about organising the capacity to collect stories, but also about bringing the people together to share their stories. If more funds are available, a team of story collectors can be hired to run the story collection process simultaneously in different geographical areas, so that 300-500 stories can be collected in a few days. Investing in direct incentives to get people to contribute their stories (per diems, direct payments per story, meals, food, remuneration in kind ...) will also definitely lead to more stories.

The power of Sensemaker lies in continuous story capture. It is therefore necessary to organise the story collection process in such a way that it can be repeated at regular intervals. The main costs involved for this process are staff time, fees for story collectors, meetings, meals, transport, per diems and incentives for storytellers. Depending upon the context and the geographical scope, costs may vary drastically. In VECO's case, story collection costs ranged from 2000 to 3000 Euro for 80 to 150 stories (excluding pilot testing and translation costs). If the storytellers have internet access, the story capture can be easily organised at almost no cost by simply sharing the link to the web-based COLLECTOR® application – an option that is not possible if one works with people in rural communities.



Entering stories and signification in the COLLECTOR® application

When a 'pen & paper' approach is used, it is advisable to organise the transcription, translation (if necessary) and data entry in the web-based COLLECTOR® application as quickly and efficiently (and accurately) as possible after story collection. This can be easily outsourced at a relatively low cost. Of course, this step is not needed when the stories are directly entered in the web-based COLLECTOR® application.

First-level analysis – pattern seeking process

Once the data are entered, the basic or more advanced analysis with the Sensemaker software needs to be done by people who understand the software well. Furthermore, developing an appropriate analysis approach to suit the specific intended use of the data takes time and a lot of 'playing around' with the data. This is due to the fact that the current version of Sensemaker software (version 2.5 beta 1) still involves a lot of manual work, which makes it a very time-consuming exercise.

In VECO's case, it was only realistic for a basic analysis to be carried out by a limited number of internal staff. A more advanced analysis was carried out by an external expert analyst. As such, there is no need to involve many people in this process as this would be an enormous capacity-building exercise and not be cost-effective. However, it is important that the people coordinating the process within the organisation are very familiar with the software and able to carry out all the functions needed for a basic analysis. An adequate basic/advanced (pattern seeking) analysis cannot be done without sufficient training. For first time users, external support is highly recommended.

It is crucial to allocate sufficient time for this process. External experts can carry out an analysis in three to five days, whilst an advanced analysis will take up to ten days. If the analysis is taken up internally by the organisation, it will (initially) require much more time. Sufficient time also needs to be scheduled between the



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story collection and the human sense-making process as chances are high that the pattern-seeking process will take longer than expected.

The main costs involved for the first-level analysis are related to the leasing of the software (200 Euro/month/user), consultation fees for advanced analysis, and staff time.

Second-level analysis – human sense-making

The human sense-making process is one of the most important stages in a Sensemaker project as it is directly related to the feedback and use of the results. Therefore, full participation of NGO staff, partner organisations and beneficiaries is necessary during this process. It can be done in a one-off event or in a series of meetings/workshops over a longer time. The methodology can take different forms and mainly depends on the purpose of the Sensemaker project.

As such, external support to organise these events is not required although, funds permitting, it might be beneficial to hire an experienced external Sensemaker facilitator. But again, the quality of the feedback and use of the results (through human sense-making) depends more on the quality of the group facilitation skills and less on technical expertise related to Sensemaker. The costs of this stage of the Sensemaker process are mainly related to meeting, transport and facilitation costs.

Report writing

Report writing depends on the intended use and users. Sensemaker reports can be very long and detailed – and time-consuming – as many pattern combinations and story packs can be reported, and this involves quite a lot of manual operations in the software.

It is crucial to be very clear about what is expected in order to make a purposeful and user-friendly report.

The table below gives an overview of the different people involved and external support required for each stage of a Sensemaker project.

Sensemaker stage	Expert input (internal/external)	VECO staff	Chain actors: Farmer organisations and other partners, companies	Farmers
Design of the signification framework	Support and guidance	Facilitation of the design	Participatory consultation	
Story collection and signification		Coordination	Participation as storytellers & signifiers	Participation as storytellers & signifiers
Data entry of stories and signification (in case of pen & paper method)	Cognitive Edge development of COLLECTOR® application (3000 Euro)	Coordination		
First-level analysis (pattern seeking)	Carrying out external analysis	Carrying out basic analysis		
Human sense-making		Presentation of patterns and facilitation of human sense-making	Participation in sense-making	Participation in sense-making
Use of results		Adaptation of programme support intervention(s)	Adjustment in practices, making decisions	

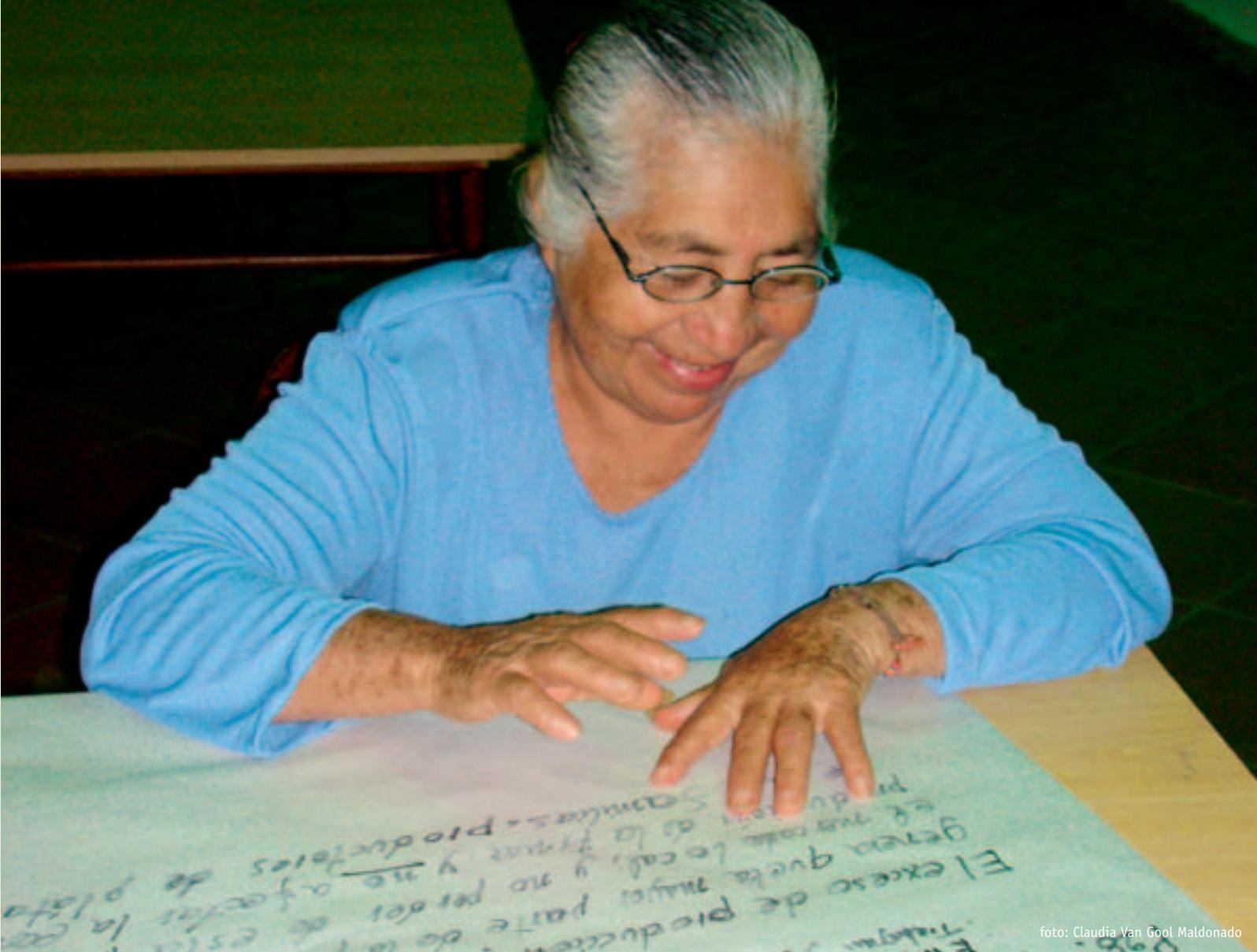


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A Sensemaker project takes a few months to a year to develop and apply for the first time. It requires constant coordination and follow-up during that period of time. Especially when aiming for a continuous story collection process, one needs to anticipate good follow-up and integration with existing M&E processes to sustain the momentum and learning cycle.

Further use of Sensemaker

This pilot Sensemaker project consisted of one full cycle of story collection and analysis. Based on this pilot experience, VECO has identified and explored a number of potential future uses of Sensemaker within the context of its programme as follows:

- Sensemaker could be incorporated into the existing baseline studies as a valuable approach to measuring the inclusion of smallholder farmers within the VECO-supported value chains. It would even be interesting to include non-VECO-supported value chains or farmers not involved in the programme but supplying to the same traders/buyers;
- Throughout the life span of the programme, VECO could organise a continuous process of story collection with (bi)-annual analysis and feedback moments with the chain actors;
- The assessment of increasingly more value chains in different

regions over a longer period would provide great potential for cross-chain analyses, comparisons and aggregations;

- If the requisite capacity and the processes are well developed, Sensemaker could be integrated into the internal/institutional learning processes and used for documentation, impact monitoring (PLAs) and accountability purposes to donors.

In order to use Sensemaker at a bigger scale, that is, to conduct continuous story collection in more value chains in different regions, the following investments will need to be made:

- The signification framework will need to be reviewed: better conceptual underpinning and fine-tuning of the signifiers (less is more!);
- Sensemaker is conceptually and operationally too heavy and complex to be coordinated by VECO's partner organisations (farmer organisations). VECO staff or other external actors will most likely need to take the coordinating role. At this stage three internal people have sufficient knowledge of the method, the process and the software. If VECO decides to use Sensemaker at a bigger scale over the coming years, it will need to invest in building the necessary capacity within VECO. An average of two people per regional VECO office will need to be trained;

- Story collection needs to be improved and organised in a more efficient way (reaching up to 100 stories per day).

Some ideas about how to reach greater scale (more stories) include:

- More direct invitations or invitations through intermediaries with very clear incentives;
 - Work with more groups at the same time;
 - Provide very tangible incentives;
 - Look at all opportunities to embed story collection within existing programme activities.
- VECO could cover parts of the costs but extra funds would be needed to ensure a continuous process. Possibilities to develop shared research/study/learning agendas with private companies, local universities or other NGOs will need to be explored;
 - Embed the Sensemaker process within a wider learning and documentation process.

To increase the use of Sensemaker within the development sector, Cognitive Edge will need to redesign the Sensemaker software and adjust its business/finance modalities. Specifically, it is recommended that Cognitive Edge should:

- Develop a user-friendly and affordable COLLECTOR® application that can be easily customised by the clients themselves. At this stage, only Cognitive Edge can develop the web-based application on demand for a flat fee;
- Develop a database with commonly used standard triads and dyads and MCQs that can assist in designing signification frameworks;
- For continuous use within a middle-sized development NGO, there is need for a revised version of the Sensemaker software that has the basic core functions for an easy, quick and accurate analysis, e.g., a light version Sensemaker that provides automatic pattern analysis and story-pack selection that can easily be exported into user-friendly formats instead of the manual operations that are needed in the current version. In addition, it could still have some basic manual pattern-seeking functions for those who want/need to explore further. As such, there is probably no need for the landscape analysis function, in-depth correlation analysis, or other heavy statistical analyses;
- The software adjustments would also need to come with finance modalities that are affordable for the development NGO sector, otherwise it will be difficult for Sensemaker to find ground within programmes and organisations that operate with budget, resource and capacity restrictions.



foto: Caroline Huyghe



foto: Hans Manshoven

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