



“Theory of Change” Thinking &
its influence on
Monitoring, Evaluation, Learning & Knowledge (MELK)

Version November 2011

Introduction

JASS (Just Associates) was founded in 2002 as a “learning community” by a group of scholars, activists and popular educators from thirteen countries eager to combine reflection and action in support of social justice and human rights work. JASS has changed significantly since 2005, after deciding to focus on retooling and mobilizing women’s movements from local to global levels. With that decision, JASS has restructured, building on the deep political relationships and histories of our community to construct an international feminist actor driven by regional operations in Mesoamerica, Southern Africa and Southeast Asia.

While the habit of learning is ingrained in the DNA of JASS, our growth and evolution have demanded that we articulate a common agenda for learning and develop frameworks, processes and tools to systematically document and disseminate this knowledge. In doing so, we recognized the need to differentiate between two learning goals:

1. **Program management and accountability**, for which traditional M&E tools and systems (log frames, outcomes, indicators, etc...) are invaluable; and
2. **Generating knowledge from practice**, for which different mechanisms are needed to “harvest,” share, and reflect on the unique insights gained through feminist movement building

Both provide pathways to learning and for testing our **Theory of Change**, yet there is a tension in trying to identify a single monitoring, evaluation, and learning framework and system to capture both. What follows is an overview of the broad conceptual framework, of which the Theory of Change is a part, for planning, implementing, and evaluating our work. This framework is the product of various moments of self-assessment, strategic thinking and organizational development over the last two years and continues to be a work in progress. Inputs have been provided by people within and outside the JASS community including Annie Holmes, Srilatha Batliwala, Valerie Miller, Laura Roper, Alia Khan and Lisa VeneKlasen.

*JASS Cross-regional Office
Washington, DC
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About JASS (Just Associates)

Who we are

JASS is an international feminist organization founded by a community of activists, popular educators, and scholars working with women in thirty-two countries at the grassroots, national, regional, and transnational levels. JASS' training, organizing and action strategies strengthen the voice, visibility, and collective organizing power of women in order to change the norms, institutions, policies, and practices that perpetuate inequality and violence.

What we do

JASS carries out feminist “movement-building” activities (e.g., workshops, training, dialogues) designed to re-politicize, retool, and re-energize women’s movements from local to global levels. At the core of its work is the creation of “safe spaces” where women come together to gain political skills, analyze, and strategize to advance rights and improve their own safety as activists. By expanding women’s creative use of social media in combination with a wide range of alliances, JASS seeks to amplify women’s agendas and influence at all levels, and to mobilize urgent actions in response to extreme violations of women’s human rights, well-being, and dignity

How we are organized

JASS is driven by three semi-independent regional operations in Mesoamerica, Southeast Asia, and Southern Africa, connected for learning, strategizing, and action by a cross-regional operation. JASS regional teams are comprised of diverse women activists closely linked to allied movements and women’s rights agendas; in this way, JASS is able to multiple its reach while retaining the agility of a minimal staff. JASS regional offices are located in Cape Town, Jakarta, and Mexico City, and a cross-regional office based in Washington, D.C.

Global threats disproportionately affect marginalized people, including women

- States lack the capacity or political will to protect and uphold women’s rights; increasing militarization in the name of security and the “war on drugs” is normalizing violence and fostering a culture of impunity
- Shredded safety nets, income inequality, and economic crises increases women’s economic vulnerability, fueling migration and further exploitation
- Religious political extremists increasingly wield social and political influence with women’s bodies and sexuality as a key battleground
- Environmental disasters, both natural and man-made, create profound instability

- **New and increased forms of violence against women and women human rights defenders**
- **Economic vulnerability, insecurity, and exploitation**
- **Continuous attacks on and erosion of sexual and reproductive rights**

Meanwhile...

- The professionalization or “NGO-ization” of social change and advocacy has contributed to fragmentation within and among social justice movements, with key players operating in issue silos and increasingly disconnected from grassroots constituencies
- Development paradigms favor technical “quick fixes” and are modeled on market-based assumptions that overlook structural drivers of global inequities

Yet opportunities exist...

- Women are on the front-lines protecting themselves, their families, and their communities
- Women’s economic influence is growing as breadwinners and consumers
- The internet and communication technologies create opportunity and potential for increased connection and political influence
- New agendas, voices, and forms of organizing are emerging and growing fast

Therefore, JASS' mission is to

Strengthen and mobilize the voice, visibility, and collective organizing power of women in order to change the norms, institutions, policies and practices that perpetuate inequality and violence in both the public and private arenas. Our power analysis and interconnected strategies build women's political and social influence for justice, ensure their equitable access to resources, and increase their safety and wellbeing as activists in an increasingly risky world.

To accomplish this, we are working to re-politicize, retool, and re-energize women's movements from local to global levels...

JASS' Theory of Change (ToC)

JASS strategies reflect the belief that establishing safe creative spaces imbued with feminist values and a movement building agenda will equip women individually and collectively by enabling them to

- ❖ Practice and innovate new forms of power, leadership and organization;
- ❖ Gain and generate new tools, information, and strategic political knowledge;
- ❖ Renew energy and spirit;
- ❖ Catalyze and deepen women's organizing and strengthen political relationships of trust;
- ❖ Construct integrated agendas to address needs, rights, and safety; and
- ❖ Build vertical and horizontal linkages across sectors, issue silos, and locations including movements, and formal and informal institutions.

From there, women will be better able to

- ❖ Mobilize and amplify their political influence and demands for resources, freedom from violence, and responsive and accountable institutions;
- ❖ Confront the crises of our times, respond to urgent situations, and protect frontline activists; and
- ❖ Resist and ultimately transform power – in all its relations, structures, forms, spaces, and places.

We believe that this will, in turn, make a significant contribution to achieving equality, democracy, justice, and peace for all people and the planet.

Some assumptions behind JASS' Theory of Change

About women's organizing...

- ❖ Women's organizing makes a difference by expanding and improving women's role in decision-making, thereby improving resource distribution and deepening democracy – this is the only route to eradicating violence
- ❖ Many movements have organized women but instrumentally; organizing led and shaped by women's political agendas is fundamentally different

About activist leadership for movement building...

- ❖ Effective women's organizing requires varieties of activist leadership - including the capacity to facilitate, mediate and mobilize - embodied in multiple leaders throughout the movement
- ❖ Activist leadership is about shifts in psychology, ideology and practice; it is built through an individual and collective dynamics
- ❖ Activist leaders use these psychological and ideological shifts to construct change process in the worlds women occupy

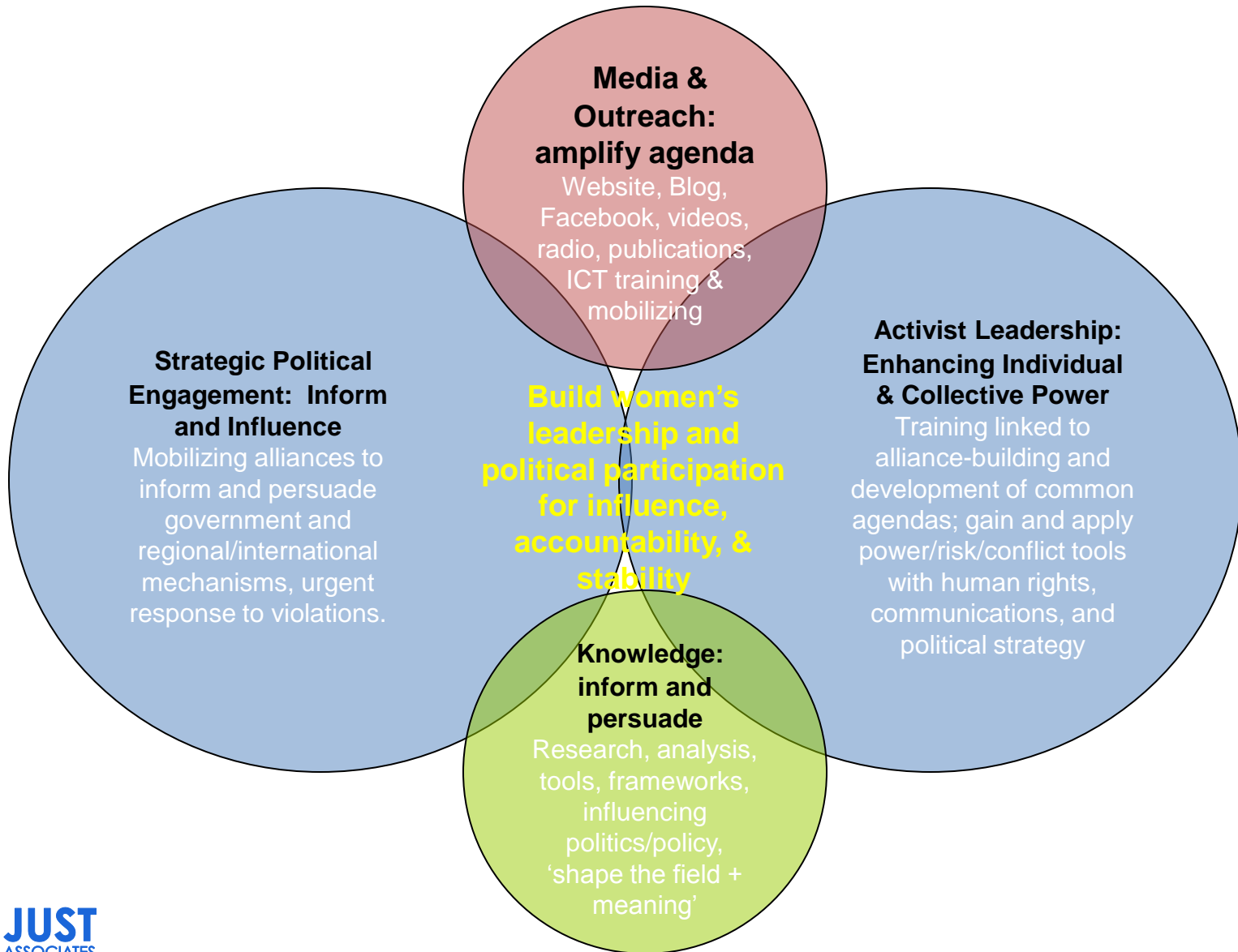
About collective action...

- ❖ Organizing is about bringing women together to better understand and work collectively to solve common, deeply-felt problems; the movement building process may start with small, seemingly minor problems, but the collective experience inspires more women to join and tackle bigger agendas.

About the outcomes and impact of women's organizing...

- ❖ These change processes will engage formal and informal decision-making and resource distribution in ways that advance women's rights, improve livelihoods and wellbeing.
- ❖ These processes also generate conflict at all levels, both within and without, and this is a source of creative change, knowledge and power; but also of risk and negative repercussions.
- ❖ Our processes may have ripple effects in unexpected places, and we in turn will be affected by others' processes in unexpected ways (e.g. feminists in resistance).

Translating theory into practice: strategies & activities



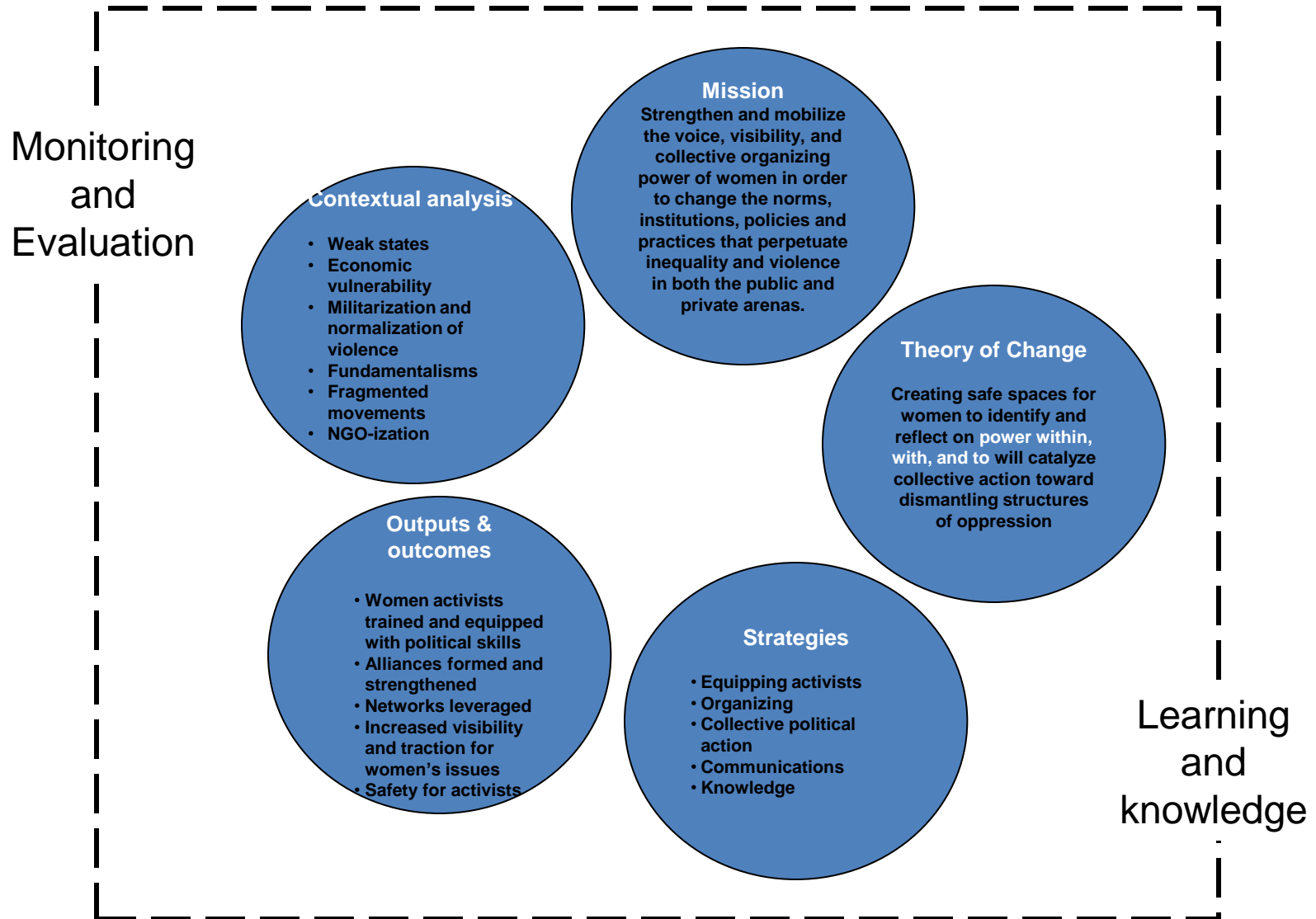
Learning and knowledge production is embedded in JASS' DNA

Guiding principles for JASS' monitoring, evaluation, and learning

- MELK should be a powerful tool for change by addressing both the lived challenges of JASS and its allies and by contributing to a deeper understanding of why and how feminist organizing makes a difference
- MELK methodologies and processes should be based on feminist theory and practice
- MELK is a process, and it is political; the choice of frameworks, indicators, processes, etc... is embedded in a set of distinct values; as such, it can be transformative and emancipatory and/or serve to reproduce and reinforce structural inequalities. Addressing this in practice involves being deliberate and explicit in determining
 - what needs measurement, why and for whom
 - who will do the measuring and how
 - how the knowledge gained from measuring is used
 - who benefits from the knowledge produced
 - who owns the knowledge and has a say in how it is used
- MELK should be built around the JASS power framework (the faces and expressions of power) and the JASS theory of change as it is manifested in its strategy
- MELK should constantly seek to incorporate and leverage the full diversity of learning styles, individual and collective expression, and ways of creating and interpreting meaning out of JASS' work

PART 1
JASS Theory of Change
for program management, monitoring, and evaluation

Theory of change and JASS program cycle



Measuring our work: outcome areas

- 1. Shifts in women's number, diversity, behavior and actions as change agents, mobilizers and activist leaders in families, communities, civil society and the political arena**
- 2. Shifts in the quality and agility of political relationships and engagement, collective processes and behavior that strengthen women's organizations, movements and linkages (horizontal and vertical linkages established and able to activate quickly)**
- 3. Shifts in norms, ideas and public discourse; specifically, stigma, taboos and denial about sex and sexuality, tolerance for violence against women, and the relative importance/contribution of women's rights to development, democracy and human rights**
- 4. Shifts in engagement with decision making structures and formal power (holding the line; improved ability to anticipate and deal with repression and backlash) and improved responsiveness of institutions to women's demands**

Measuring our work: indicators and tools

INDICATORS ARE IDENTIFIED FOR EACH OUTCOME AREA AND TAILORED TO EACH REGION

Sample indicators

- Numbers of women participating in JASS' movement-building workshops, trainings, dialogues, self-care, etc...
- Number of women self-reporting improved well-being
- Numbers of women demonstrating increased activist leadership
- Number of stakeholders (allies and targets) adopting feminist language and using feminist analyses
- Number and type of alliances formed
- Number of political actions taken
- Number of stakeholders who respond to action alerts
- Number of mainstream media "hits"
- Number of social networking actions taken (e.g., "likes," comments, etc...)

SAMPLE DATA COLLECTION TOOLS

After-event reports (AERs) track outputs (e.g., number of participants) and include scaled ratings related to

- Event design
- Execution
- Signs of strengthened leadership
- Degree to which objectives were met
- Degree of meaningful dialogue fostered
- Actions participants commit to

Urgent action reviews assess

- Changes in an alliance (number of organizations, change in roles, level of trust)
- Coordination
- Communications/media
- Mobilization and outreach
- Influence on formal power/discourse

Monthly reports from each region document

- Products (e.g., papers, manuals)
- Actions/activities
- Ongoing processes and upcoming activities
- Media outreach and coverage
- Opportunities, risks, and challenges
- Internal organization issues and processes

Putting it all together

Women's behavior and actions as change agents...in families, communities, civil society. Political relationships and engagement, collective processes, behavior that strengthen women's organizations, movements. Norms, ideas, attitudes, and 'framing'. Engagement with power (holding line, ability to deal with backlash) . Responsiveness of institutions

Impact: Long-Term Change in:

What difference can women's organizing + movement building make?

Strong influential women activist leaders, inclusive organizations + movements based on feminist visions, analyses, and values

Women's wellbeing and new paradigms and practices of power

Major Intended Outcomes Long-Term

Increased capacity, spaces, knowledge and products for:

Feminist Leadership and Organizing

Mobilization and Strategic Action

Knowledge Generation

Communication Approaches

Intended Outcomes - Short and Mid-Term

Skills in analyses, facilitation, critical consciousness, power, negotiat'ns, strategiz'g , Integrat'g mind, body, heart , self-care, deal'g with conflict , etc Information re rights etc

Web of alliances
Solidarity
Resources
Action skills
Effective actions

Contributions to theory, practice, new paradigms
Stories
Make alternatives visible

Increase skills + use of media to connect, attract, + amplify fresh messages

Outputs + Results

Workshops, mentoring, organizing on local issues

Urgent Actions, alliance bldg, policy connections

Action Research, Reflection/ Writeshop, Tools, how to's

Publications, videos, blogs, websites, articles, radio

JASS Activities

Activist Leadership

Strategic Action

Knowledge

Communication

JASS Movement-building Strategies

Women's Voice, Visibility, and Organizing Power

JASS Mission - Core Functions

PART 2
JASS Theory of Change
for generating new knowledge

Our Theory of Change is based on our analysis of POWER

This change we seek can be understood within **a power framework:**

- fostering power within, with and to;
- mindful of all spheres of life (intimate, private and public);
- and the faces of power (visible, hidden, invisible)
- ultimately concerned with how individual change supports movements that can reshape visible and challenge hidden (shadow) power

That is, **successful JASS initiatives ultimately should have visible manifestations in changed power relations and policies in the public sphere (although this may be a very long term proposition).**

Learning and knowledge production should provide insight into how women, individually and collectively, engage with and transform power

(GENERALLY COLLECTIVE EXAMPLES, SOURCES OR INDIVIDUALS, TYPES OF EVIDENCE)

	Power within	Power With	Power to	Pushback to Power Change
Intimate	<ul style="list-style-type: none"> - Invisible power - increased sense of self respect - insights to nature of oppression - comfort with sexuality 	<ul style="list-style-type: none"> - overcoming mindset of competition with other women - see the potential of working with other women to address problems 	<ul style="list-style-type: none"> - overcomes insecurities to take the first steps to reach out; engage with others 	<ul style="list-style-type: none"> - Depression or anxiety
Private	<ul style="list-style-type: none"> - sees multiple ways she is of value to the family - understands right to decision-making role - greater confidence in her ideas and right to express them 	<ul style="list-style-type: none"> - works with other women in family to improve conditions; - engages with husband about family decisions; leads to more spending on education 	<ul style="list-style-type: none"> - negotiate sex - take decisions alone in certain domains; act with more independence - earn and control own income 	<ul style="list-style-type: none"> - Domestic violence - Increased restrictions - Peer pressure from female guardians of patriarchy - Divorce - Manipulation of children - Community pressure
Public community workplace policy arena	<ul style="list-style-type: none"> - confidence translates into willingness to take on leadership role; - confidence in expertise or value of life experience translates in speaking out first in "safe space"; then in supportive spaces; then in more challenging spaces - strengthen capacity of strategic analysis - ability to analyze own motivations and interests to understand personal sources of conflict, where ego comes into play - resilience to manage setbacks/conflict 	<ul style="list-style-type: none"> - expands reach (network of women she is connected with) - replicates training/swarajness raising - organizes women outside the family to demand change - capacity to work in group process for analysis of context; development of strategy - ability to deal with conflict creatively in group context - capacity for critical reflection 	<ul style="list-style-type: none"> - stand for political office - demand (and win) mobile health units - mobilize regionally for Honduran democracy; shaped the debate; influence HR Commission - movement even stronger despite loss <p style="text-align: right;">Visible Power</p>	<ul style="list-style-type: none"> - Shadow forces mobilize violence - narrative distorted, hijacked in the media - efforts at co-optation; divide and conquer strategies - symbolic wins to undercut mobilization momentum

Meta hypotheses

1. Women's organizing makes a difference by expanding and improving women's role in decision-making, thereby improving resource distribution and deepening democracy – this is the only route to eradicating violence;
2. Many movements have organized women but instrumentally; organizing led and shaped by women's political agendas are fundamentally different.

Evidence to validate / disprove

Use **Power framework** to create baselines and track shifts in the three faces, and in the expressions of power (see slide 11), looking at extent JASS movement building advances a feminist perspective and women's rights agendas

Case examples using common frame looking at strategies; leadership profiles and practice; evolution of alliances and actions conflict and risk management. Inputs would include **after event review (AERs)**, **alliance mapping** (various forms) over time; interviews; focus group discussion, etc.

Meta hypotheses (cont.)

Evidence to validate / disprove

- 3. Effective women’s organizing requires varieties of activist leadership - including the capacity to facilitate, mediate and mobilize - embodied in multiple leaders throughout the movement
- 4. Activist leadership is about shifts in psychology, ideology and practice; and is built through an individual and collective dynamics
- 5. Activist leaders use these psychological and ideological shifts to construct change process in the worlds women occupy
- 6. Organizing is about bringing women together to better understand and work collectively to solve common, deeply-felt problems; the movement building process may start with small, seemingly minor problems, but the collective experience inspires more women to join and tackle bigger agendas

Develop and operationalize **profile of activist leader**; develop adaptable tool(s) that can capture these shifts in psychology, ideology and practice - e.g. leadership survey (mixed open and closed questions; some quantification).

Documentation and analysis of actions by activist leaders individually and collectively at various levels in all regions- need creative tools / methods including video testimony

Case examples using a common framing questions and the power framework to document these change processes – i.e. how feminist movements are different.

Alliance and/or power mapping

Meta hypotheses (cont.)

7. These change processes will engage formal decision-making and resource distribution in ways that advance women's rights and improve livelihoods and wellbeing
8. These processes also generate conflict at all levels, both within and without, and this is a source of creative change, knowledge and power (but also inevitable risk and negative repercussions)
9. Our processes may have ripple effects in unexpected places, and we in turn will be affected by others' processes in unexpected ways (e.g. feminists in resistance)

Evidence to validate / disprove

Cumulative evidence from case examples; change over time in power dynamics; visibilization of women's power in the public domain; change in specific policies and practices that advance women's rights

- **Women's leadership profiles** (explore internal tensions/contradictions and sources of conflict in their lives)
- **Case examples** of alliances that have overcome internal and external conflict and those that haven't.

Stakeholder survey in broader movements; incorporate this question in case example frame.

Unfinished business

Understanding, navigating, and transforming power is a PROCESS. Therefore, JASS learning must focus not only *what* we do but *how*

About developing leaders

- Capture/define JASS's profile of activist leadership (individual and collective)
- Document the processes (from formal leadership training to leadership evolution in the context of engaging in movement building processes) of bringing "...really different women with different backgrounds, assumptions and values into a common space where they begin to develop their own feminist thinking and appreciation of each other" and "People enter the process feeling unequal for different reasons and then there is some kind of parity, relative parity that the process creates."
- Learn more about the change process for individual women and how JASS support helps or not; the inter-relationship of changes within/with/to; from the personal to the political; identify turning points
- What are the multiplier effects, how do they happen, when are the most meaningful?
- Specific examples of women leaders dealing well with conflict, stalemates, rapidly changing dynamics.

About "Alliances" Generally

- Tracking growth *numbers* of alliances;
- Track quality of relationships; shared understanding of common agenda;
- Quality and flexibility of engagement
- Is conflict surfaced and managed effectively?
- Identify key turning points in JASS movement building continuum (is there a formal JASS continuum?)
- Do actors in the alliance feel they are more powerful than before in relation to visibility and impact?

About JASS role in movement building

- Better understanding of JASS roles and relationships in each of the regions: the role context plays in shaping how JASS works in each region
 - o SNA where NGOs have colonized movements; high level of distrust
 - o MesoAmerica and the evolution of urgent actions ; what have we learned about identify opportunities and synergies?
 - o Does JASS 'detonate' or displace?