



Theory of Change: From Development to Facilitation

online course

Become a Theory of Change Expert!
Date: 1st August to 24th October 2023



MDF
EMPOWERING PEOPLE,
CREATING IMPACT



Summary

Start by learning all the basics about Theory of Change with the help of our one-of-a-kind e-learning. Then apply what you learn and develop your own Theory of Change, on which you will receive feedback during a coaching session. But why stop there? A Theory of Change ought to be a co-creation process with stakeholders. During four facilitated live sessions (16 hours total) you will learn how to facilitate these processes and become a Theory of Change facilitator.

Organisations

This Theory of Change training is a joined initiative by MDF and TheoryofChangeCourse.com

MDF | Empowering People, Creating Impact

has over 35 years of experience in providing management training, advisory and evaluation services worldwide. We are an acknowledged agency with a relevant track record on local, regional and international levels. We have supported many organisations across the world, training people and organisations on ToC development and implementation, and are experienced hands on ToC workshop facilitators.

TheoryofChangeCourse.com

is the premier e-learning in the market of ToC training. The online training:

- Provides high-quality content that covers the full spectrum of ToC topics. It starts at the level of a beginner and continues at an intermediate level.
- Is completely animated, builds upon a storyline, and includes gamification elements. It makes learning fun and engaging.
- Is practical; step-by-step assignments help you develop your own ToC.

Business for Development

is a social enterprise that seeks to advance the capacity for ToC-thinking amongst purpose-driven organisations. It is the founder of initiatives such as TheoryofChangeCourse.com and Changeroo, an online tool and platform for ToC-thinking.

Instructors



Sam Boering
(MDF Training & Consultancy)



Sam Boering is a development practitioner with over 34 years of work experience (of which 20 with MDF), working across the globe with a wide variety of organisations in various contexts. For about 10 years now, he has been working with ToC, providing hands-on training as well as providing support in ToC processes, e.g. by conducting ToC workshops (of course now mostly online).

During the training, Sam will be responsible for the live, facilitated sessions on ToC facilitation as well as the individual coaching sessions during which you'll receive individual feedback on the ToC you've developed during the training course.

Martin Klein is the founder of Business for Development, which is the social enterprise behind the e-learning on ToC-thinking and the Changeroo ToC platform. He holds a PhD in strategic management on Bottom of the Pyramid strategies (how to combine an entrepreneurial approach and poverty alleviation), and conducted the first global survey among pro-poor for-profit businesses by successfully sourcing the support for such a survey from various international development organisations.

Martin will be the training coordinator and responsible for the online ToC e-learning.



Martin H. Klein
(Business for Development)



Curriculum

Training component	Short description	Dates / Deadlines	Instructor
1 E-Learning	A self-paced, modular and engaging online course lays the foundation for the other training components.	<p>1 Aug: you receive access to the e-learning.</p> <p>28 Aug: you should have completed the e-learning.</p> <p>29 Aug 9:00-11:30: Live Q&A session & “Getting to know each other”</p>	<p>Coordinator: Martin Klein, Business for Development</p> <p>Support: Sam Boering, MDF</p>
2 Development of your own ToC	As part of the course, you will develop your own Theory of Change. Starting with sublevel 8 of the e-learning, you’ll receive assignments to talk you through the development of your ToC. You will receive access to a tool called Changeroo, which you’ll be free to use.	<p>1 Sep: You receive access to Changeroo to build your own Theory of Change.</p> <p>25 Sep: You should have finished building your Theory of Change.</p> <p>25 Sep: Submit your final ToC.</p>	<p>Coordinators: Martin Klein, Business for Development & Sam Boering, MDF</p>
3 ToC feedback: Individual coaching session	A coaching session with personalised feedback on the Theory of Change that you will have developed, as well as (possible) suggestions on the process of ToC development and implementation.	Half hour session per student. Either before (26, 27, or 28 Sep) or after the live sessions (depending on the participant’s preference).	Sam Boering, MDF
4 Facilitated, live session	During facilitated online sessions, we’ll zoom in on the role of the facilitator of the ToC development process. You’ll learn about the methodologies and exercises to give shape to the different facilitation elements: from setting the agenda and building a supportive setting, to developing buy-in, conducting preparatory research, and building consensus. We will look at examples how to successfully tap into the collective knowledge and challenge such.	<p>3 Oct 9:00-13:00 CET: Session 1</p> <p>10 Oct 9:00-13:00 CET: Session 2</p> <p>17 Oct 9:00-13:00 CET: Session 3</p> <p>24 Oct 9:00-13:00 CET: Session 4</p>	Sam Boering, MDF
5 Online discussion forum	A good way to ask questions before the live sessions is an online forum (for course participants only).	https://theoryofchangecourse.com/forum	
	Here you can discuss progress and ask questions to your fellow students. Instructors will drop in from time to time.		

Certification

You will receive a certificate upon the successful completion of the course. To receive the course certificate requires your full participation in all activities.

Date and price

When	August 1 – October 24 2023
Where	Online
Course fee	€1250
Registration deadline	7th July

Group discount

If you register with multiple people from the same organisation, the second person receives a 10% discount and the third person from the same organisation receives a 50% discount.

Course content is fluid and may slightly change as group needs call for this.

1. E-learning

The online course “Theory of Change: From novice to master change maker” makes up for the first part of the training. It’s fully animated and builds on a storyline that takes place on the island of Chanoo. It provides a unique self-paced course that is practical, visual and engaging through gamification elements. The e-learning will form the backbone for the other training components to build on.

Learning agenda: Annex A provides you with an overview of the learning goals of the different learning modules of the e-learning.

Study load: 10+ hours.

Your commitment counts a lot!

The nature of a self-paced e-learning is such that it requires responsibility from you as a learner as to your commitment to learn. While you can click through the e-learning relatively quickly, it is important to really take in the lessons, read text a second time, give assignments your best effort, and later perhaps go back to a lesson and go through it once more. That's also why you'll have access to the e-learning for six months.

You're encouraged and advised to make notes as you go through the e-learning. During the facilitated, live session you can follow up the e-learning with any questions you might have.

Accessing the e-learning

The course coordinator, Martin, will create an account for you for the e-learning. An email with your login credentials will follow on the 1st of August.

In case of technical difficulties, please contact Martin via martin.klein@businessfordevelopment.com.

Online forum

On our online forum (go to: <https://theoryofchangecourse.com/forum/>) you will be able to ask any questions you might have as you progress through the e-learning. Here you can discuss progress and ask questions to your fellow students. Instructors will drop in from time to time.

Q&A Session

At the end of the month, you should have completed the e-learning.

On August the 29th we will have a live, online Q&A session to wrap up the e-learning. That way, all of the theory on Theory of Change is completed in August, and you are all set for the next step.

2. Development of your own ToC

The month of September is dedicated to you working on developing your own, self-selected (thus relevant), Theory of Change.

- Starting at module 8 of the e-learning, the e-learning will give you assignments that will add up to a draft of your own ToC.
- As part of the course, you will receive access to software called Changeroo (changeroo.com) that you can use to create your ToC. If you prefer to use other software such as Mural (mural.co) or Miro (miro.com) you are also free to use that instead.
- The ToC training ends with an individual coaching session that provides you with instructor feedback on the ToC that you've built.

Study load

We understand it will differ per student how much time you're able to spend on the development of your ToC. We don't expect you will be able to engage with external stakeholders in this process, but if you can that's of course a great bonus.

Study load: 12-24 hours, or more if students' diaries allow.

Instructions: Selecting a program or project

Each student is expected to self-select a program or project for which to develop their ToC, taking into account the following:

- a. The program or project is relevant to your work context.
- b. It is a program or project you deal with in real-life.

Instructions: Submitting your project

25 Sep: Deadline for submitting the final version of your ToC. Please submit your ToC by sending an email to sb@mdf.nl and martin.klein@businessfordevelopment.com.



3. ToC feedback: Coaching session

To wrap up the development of your own Theory of Change, a coaching session will be conducted with you to discuss possible improvements on your ToC (content and process). Before the session you will receive an “assessment form”, that will be used as input for the coaching session. Other practical questions / issues in relation to the ToC process may also be addressed. A link for this video call will be provided to you at a later stage.

4. Facilitated, live sessions: ToC facilitation

During 4 facilitated online sessions, we'll zoom in on the role of the facilitator within the ToC development process.

Study load: 4 half days.

Session 1: ToC as a group process

The development of a ToC is a co-creation process to which the input from stakeholders is indispensable. During the first session we zoom in on the organisation of a great co-creation session: who to invite, develop the agenda, setting the stage, ensuring productive group dynamics, and more.

Q&A	Where everyone can introduce themselves and we look at the questions you may have in response to the course work you've done thus far.
Introduction to facilitation (Theory)	We present and discuss some of the background theory on group dynamics. We will make an inventory of general lessons learned with regard to facilitation of (online) (ToC) workshops and the role of the facilitator.
Dos and Don'ts in facilitation	During this part we will establish our own checklist of Dos and Don'ts in (online) facilitation. This will be work in progress: at the end of all facilitated live sessions, the checklist will be complete.
Inviting the right stakeholders	Exercise: Who needs to be part of the ToC process, why and how? This exercise will link your understanding of the ToC process with the reality of your own work situation.
The agenda	Exercise: Develop your own outline of a facilitated ToC process. Work on your own case.
Feedback carousel	Participants will have the chance to look at the developed agenda outlines, and provide feedback guided by a number of questions.

Session 2: Personal facilitation skills

What are the skills that make for a great facilitator? During the second session we explore these skills and apply them to the development of a Vision of Success.

Q&A / Recap	We start with some time for questions in response to the e-learning and your experiences so far with the development of your ToC for the course, particularly the general narrative.
Active listening: Theory	One of the key aspects of facilitation is active listening, which includes demonstrating interest, asking questions, summarizing, checking of your understanding, etc.
Active listening: Application	Exercise: In this exercise we will practice active listening. This part of the session will be recorded for further personal reflection and (auto)-feedback.
Vision of Success: Introduction	We will introduce and present an exercise (process steps) for developing a joint vision of success.
Facilitating the development of the Vision of Success	For each of the steps we will identify facilitation questions.
Exercise	Exercise: With the help of a simulated workshop session we will practice the use/application of the facilitation questions.
Feedback	You will have the chance to reflect on your application of the facilitation questions, as well as obtain feedback from the other participants.
Lessons learned	At the end of the session we will reflect on the following: <ul style="list-style-type: none">• The relation between individual performance as facilitator and group dynamics.• The difference between asynchronous and synchronous facilitation, and the required skills.• Dos and Don'ts (revisited).



Session 3: Facilitation of the development of pathways

Thinking in terms of causal pathways is a core component of ToC thinking and ToC visualisation. Yet, many ToCs fail to develop a sound rationale. Logical, analytical thinking is challenging and many cognitive biases loom in the background. We will zoom in on how a facilitator can optimally leverage participants' expertise and help participants remain critical of the logic in their own thinking.

Q&A / Recap	We start with some time for questions in response to the e-learning and your experiences so far with the development of your ToC for the course.
Facilitation micro-skills: Introduction	We will discuss using micro facilitation skills for Involving and engaging participants in (online) facilitated workshops.
Facilitating the development of pathways: Theory	We will look at three complementary approaches to developing of pathways of change: backward mapping, start with what you do, and an actor-based approach.
Exercise: Brainstorm ... how to?	Exercise: In this exercise the group will identify facilitation questions (linked to the theory) and/or the most relevant probing questions to be used.
Facilitating the development of pathways: Application	Exercise: During the following exercise the focus will be on the use of micro skills as well as the application of the facilitation questions. This part of the session will be recorded for further personal reflection and (auto)-feedback.
Feedback	You will have the chance to reflect on your application of the facilitation questions, as well as obtain feedback from the other participants.
Lessons learned	At the end of the session, we will reflect on the following: <ul style="list-style-type: none"> • The use of micro-skills in an online workshop environment. • The effectiveness of the selected facilitation/probing questions in developing pathways of change. • Dos and Don'ts (revisited).

Session 4: Facilitation in bringing assumptions to the surface

Perhaps the biggest challenge to ToC facilitation is bringing the assumptions underneath a ToC to the surface. We will explore how a facilitator can help participants to bring to the surface assumptions they often are unaware of.

Q&A / Recap	We start with some time for questions in response to the e-learning and your experiences so far with the development of your ToC for the course.
Inventory of external conditions necessary for conducting a ToC workshop	During this part of the session, we will look back at the necessary conditions for organizing an effective (online) ToC workshop, e.g. there will be attention for information needs.
Facilitating the development of assumptions: Theory	We distinguish between three different types of assumptions, world view, context and pathway related assumptions. For each we will identify relevant facilitation questions.
Exercise: Brainstorm ... how to?	<p>In this exercise we will prepare for a (simulated) role play session. As the starting point for developing a workshop will be a case with conflicting world views and a specifically complicated context.</p> <p>The group will analyse the case and develop a workshop approach for identifying key assumptions for further investigation and testing.</p>
Role play	Exercise: We will conduct a role-playing exercise.
Feedback	You will have the chance to reflect on the role play and what this means for the facilitation of ToC processes.
Lessons learned	<p>At the end of the session, we will reflect on the following:</p> <ul style="list-style-type: none">• Desired external conditions.• Inclusiveness of the ToC development process.• Dos and Don'ts (revisited).

Zoom link

We'll use Zoom for the video calls. During the sessions we'll be using Mural (www.mural.co), so it might be good to sign up for an account before the session. The Zoom link is the same for each session.

Annex A: Learning goals of each of the 18 modules of the e-learning

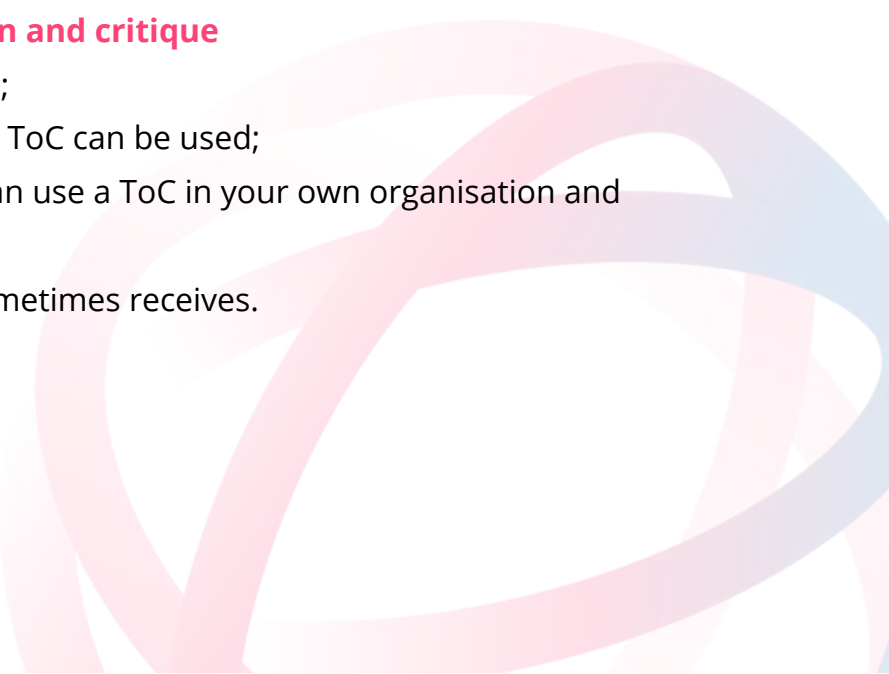
Module 1: Introduction and background

- Understand the underlying issues that have led to the development of the ToC concept;
- Know a ToC is a compass to help navigate a change process;
- Understand a ToC changes over time (e.g. as a result of new insights, learned lessons, impact measurement or contextual changes);
- Understand an example of a simplified ToC.

Module 2: What is a Theory of Change?

- Know what a ToC is;
- Understand the most important characteristics of a ToC;
- Understand the value of a ToC in management of social and environmental change;
- Can explain why development of a ToC is practically valuable and relevant for you;
- Understand why clarifying assumptions and testing them are important in the process of creating a ToC;
- Understand how the process of creating a ToC may be even more valuable than the actual document.

Module 3: ToC practice: application and critique

- Understand who are using a ToC;
 - Understand for what purposes a ToC can be used;
 - Have discovered the ways you can use a ToC in your own organisation and practice;
 - Are aware of the critique ToC sometimes receives.
- 

Module 4: Assumptions

- Know what an assumption is;
- Are aware of the fact we all make assumptions;
- Understand we are often unaware of our assumptions;
- Understand that recognizing assumptions and testing them is a core element of ToC development;
- Are able to distinguish between different types of assumptions;
- Understand the behavioural-based pathway by Mayne and the types of assumptions in it;
- Are able to bring assumptions to the surface in an example by using different strategies (involve stakeholders, be aware of different types of assumptions and ask deepening questions);
- Are able to formulate an assumption in positive terms;
- Are able to create a learning agenda based on the formulated assumptions.

Module 5: Theory of Change thinking

- Understand what ToC-thinking is;
- Understand how you can apply ToC-thinking in an example;
- Have discovered the value of ToC-thinking;
- Can explain why stakeholder engagement and co-creation are important in ToC-thinking;
- Understand when a causal relationship is (un)necessary, (in)sufficient or meets the INUS conditions;
- Can apply the INUS framework to a simple example;
- Understand the three levels of probing (causation, warrant and causal assumption);
- Have practiced with the three levels of probing by asking the questions: how, why, for whom and under what circumstances in examples.

Module 6: The theory in Theory of Change

- Understand the importance of using existing theories while developing a ToC;
- Can explain different types of mechanisms (situational mechanism, action-formation mechanism and transformational mechanism);
- Understand the difference between theory and assumptions;
- Can find theories that help substantiate or challenge impact pathways.

Module 7: The process of developing a ToC

- Understand creating a ToC is an iterative process;
- Know which steps need to be taken to develop a ToC;
- Have an overview of the kinds of actions each step in the process contains;
- Know there are three complementary approaches to the ToC development process: backward mapping, start with what you do, and an actor-based approach;
- Can explain what backward-mapping is;
- Understand what an actor-based approach is;
- Understand how an actor-based approach is related to the ToC development process.

Module 8: General narrative

- Understand what the general narrative is;
- Understand the purpose of the general narrative;
- Know the general narrative consists of four components: 1. situation analysis, 2. vision of success, 3. purpose, scope and development process, 4. change story;
- Understand what a situational analysis is;
- Can perform a situational analysis;
- Understand what a vision of success is;
- Can formulate a vision of success;
- Understand three choices with a large bearing on a ToC's development: its purpose, scope and development process;
- Can define a ToC its purpose, scope and development process;
- Understand the basic principles of writing a change story.

Module 9: Causal chain

- Understand the ToC is a chain of causality and not a process diagram;
- Know causal chains represent the mechanisms (discussed in sublevel 6) in a ToC;
- Know that a causal chain consists of different elements (context, inputs, activities, outputs, outcomes and impact);
- Can distinguish between these elements and know which represent the Theory of Action and which represent the change process;
- Understand when something is in- or outside the sphere of control, the sphere of influence, and the sphere of interest;
- Are able to turn your vision of success into impacts or outcomes of your own organisation.

Module 10: Impact and outcomes

- Can explain what an outcome and what an impact is, as well as distinguish between the two;
- Understand what preconditions are;
- Can distinguish between outcomes that are early, intermediate or late preconditions to the vision of success;
- Understand what a side-effect and an unintended effect are;
- Understand side-effects and unintended effects can be positive as well as negative;
- Are aware of the importance of preventing or minimising negative side-effects;
- Know there are different types of impacts and outcomes;
- Can formulate an outcome in the correct structure;
- Can define the desired attributes of an outcome;
- Have defined the outcomes and impact of your own ToC.

Module 11: Pathways

- Understand what a ToC pathway is;
- Have discovered there are two metaphors for a ToC pathway, reflecting two different perspectives (ToC as a roadmap versus ToC as a compass);
- Understand particularly arrows (causal relationships) reflect the rationale and reasoning behind how change comes about;
- Are able to translate mechanisms into pathways;
- Are familiar with the different features of a causal relationship;
- Understand there are different pathway structures;
- Have defined the individual relationships in your own ToC;
- Have identified the different strands of change in your own ToC and formulated coherent pathways (of the same strand) to organise your own ToC.

Module 12: Theory of Action

- Know what a Theory of Action is;
- Know the Theory of Action consists out of three different elements (inputs, activities and outputs);
- Know there are different types of inputs, activities and outputs;
- Can define the desired attributes of these elements;
- Are able to construct pathways to outcomes;
- Have specified for your own ToC its Theory of Action the elements with their descriptive attributes.

Module 13: Making your ToC context-specific

- Are aware of the fact the ToC needs to be aligned to its context;
- Can apply the three levels of probing (causation, warrant and causal assumption) to identify context elements;
- Are aware of the importance to look at the local context in terms of challenges as well as opportunities;
- Identified challenges and opportunities within your own context;
- Understand how contextualisation matters for the scalability of a ToC;
- Are able to align your ToC to the local context on different dimensions (intervention strategy, change process, terminology, ToC development process);
- Discovered different approaches to include the context in the ToC representation;
- Incorporated the context in your own ToC.

Module 14a: Strategy narratives - Part 1

- Understand what strategy narratives are;
- Are aware strategy narratives offer additional details about a ToC — written from a societal perspective — that are relevant to the ToC its success;
- Understand how strategy narratives encourage stakeholder engagement;
- Understand the kind of input and feedback stakeholders may provide on the strategy narratives;
- Know there are six categories of strategy narratives;
- Understand validation takes three forms (arguments, assumptions and evidence);
- Are aware of how a ToC is related to building a measurement framework;
- Used the three forms of validation to make your own ToC credible and persuasive;
- Added the assumptions to your own ToC;
- Thought about a measurement framework for your own ToC.

Module 14b: Strategy narratives - Part 2

- Understand how opportunities and threats to a ToC inform about where there is room to improve the ToC;
- Understand what critical junctures are;
- Understand how innovations within a ToC say something about the uniqueness, creativity and competitive advantage within a ToC;
- Are able to use the articulation of needs within a ToC to encourage stakeholder engagement;

- Can formulate the relevant information for four strategy narrative categories, from the perspective of an organisation's capacity to create societal value (opportunities & threats, trade-offs, innovations, needs);
- Applied these four strategy narrative categories on your own ToC.

Module 15: Level of specification

- Understand the pros and cons of and high and low level of detail of a ToC;
- Are able to assess whether you need a more or less detailed ToC;
- Know four different frameworks to assess the completeness of a ToC;
- Understand what a nested ToC is;
- Understand how grouping, nesting and creating different ToC versions for different purposes, can help make a ToC easier to read;
- Tested your own ToC on its completeness and eliminated unnecessary elements;
- Applied grouping, nesting and/or creating different ToC versions, to your own ToC.

Module 16: Common ToC pitfalls

- Are familiar with some of the most important features of a great ToC;
- Understand 16 of the most common pitfalls within the ToC practice;
- Assessed your own ToC on the 16 pitfalls;
- Are able to conduct a ToC quality audit.

Module 17: Learning & adaptive management

- Are permeated of the necessity of a learning culture and that a ToC should be a living, breathing document that you continue to adapt over time;
- Consider the ToC as the cornerstone of impact management;
- Understand the consequences for ToC of an adaptive approach;
- Understand the value of a flexible and emergent Theory of Action;
- Are able to apply scoping and focusing on your own ToC;
- Are familiar with a wide spectrum of concepts important to an organisational culture for learning;
- Created an action plan on how to grow a learning culture in your own organisation based on ToC-thinking.

Registration

Contact Jacqueline Stam
registration@mdf.nl

Cost

€ 1250

Dates

August 1 — October 24 2023

Special offers
available for our
alumni and
organisations.
Consult us!

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