2022 CLA CASE COMPETITION

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Case Title:

Developing an Adaptive Management Framework: Scenario Planning in Lebanon

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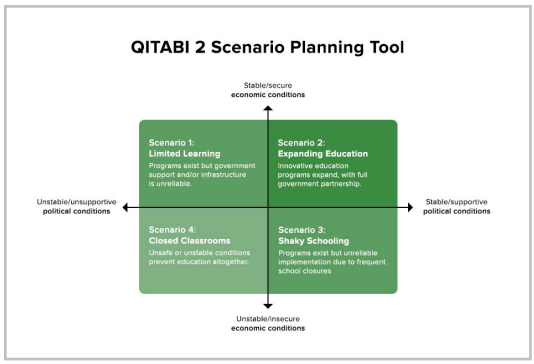

QITABI's 2x2 scenario planning matrix in response to the October 2019 political uprising

Summary:

Public schools in Lebanon have largely been closed for the last three years. During the academic years 2019-20 and 2020-21, Lebanon experienced an unprecedented number of crises. The October 2019 political uprisings, the COVID-19 pandemic, an economic collapse, and the Port of Beirut explosion have either amplified existing threats to public education or given rise to new risks.

The overall context and landscape under which QITABI 2 (meaning “my book” in Arabic) was designed have changed dramatically, impacting its operations and implementation. The activity strives to build the educational system’s institutional capacity for sustainability and self-reliance. At the onset of the political uprising, the QITABI 2 team recognized that implementation under the changing context required development of a systematic and forward-looking adaptation framework.

We collaborated with USAID and the consortium partners to develop the framework. The concept was simple—identify and monitor factors that cause operational uncertainty, brainstorm on the likely scenarios these factors can lead to and prepare for potential problems. Key to all this was embedding the framework into existing management and reporting practices.

Our CLA approach has had tangible impact. As a team, we have evolved into reflective practitioners better equipped to respond to on-the-ground realities. Meanwhile, COVID provided a strong proof of concept for our developmental impact. Using adaptive processes honed during previous crises, we supported the ministry’s pivot to distance teaching, helped make learning materials more accessible, supplemented students’ nutritional requirements and are now working on learning recovery programs to address learning loss.

Which two subcomponents of the Collaborating, Learning & Adapting (CLA) Framework are most reflected in your case? Please reference them in your submission.

- Internal Collaboration
- External Collaboration
- Technical Evidence Base
- Theories of Change
- Scenario Planning
- M&E for Learning
- Pause & Reflect
- Adaptive Management
- Openness
- Relationships & Networks
- Continuous Learning & Improvement
- Knowledge Management
- Institutional Memory
- Decision-Making
- Mission Resources
- CLA in Implementing Mechanisms

1. WHAT: What is the general context in which the case takes place? What organizational or development challenge(s) prompted you to collaborate, learn, and/or adapt?

Public schools in Lebanon have largely been closed for the last three years. During the academic years 2019-20 and 2020-21, Lebanon experienced an unprecedented number of compounded crises. The October 2019 political uprisings, the COVID-19 pandemic, an economic collapse, and the Port of Beirut explosion have either amplified existing threats to public education or given rise to new risks and challenges. In the current school year, students had only received a grim 25 days of instruction by February 2022 versus the planned 60 days due to a teachers' strike.

The series of challenges places enormous stress on an already overburdened system. The influx of roughly 1.5 million Syrian refugees increased the demands on the system, surpassing its absorption capacity and further destabilizing the system. The education ministry responded to the influx by incorporating afternoon shifts to enroll 279,000 Syrian students.

Additionally, the financial crisis has weakened families' ability to afford private school, forcing 35,000 Lebanese students to move to the public system. Historically, only 30% of school-age children were enrolled in the public schools.

The overall context and landscape under which QITABI 2 (meaning "my book" in Arabic) was designed have changed dramatically, impacting its operations and implementation. The launch of early grade reading and math baseline assessments were delayed by two years. Further, the teachers' strike delayed the approval of teaching and learning materials. Trainings that were planned for fall 2019 had to be pushed to spring 2022. At the operational level, the sharp deterioration in the Lebanese pound and the surging inflation impacted procurements as vendors declined to commit to the offered prices for more than a month. QITABI 2 aims to build the institutional capacity for sustainability and self-reliance of the educational system. It specifically seeks to improve learning outcomes for 330,000 students across all public schools.

2. WHY: Why did you decide to use a CLA approach? Why was CLA considered helpful for addressing your organizational or development challenge(s)?

At the onset of the political uprising, the World Learning QITABI 2 team recognized that implementation under the changing context required development of a systematic and forward-looking adaptation framework. We knew that a reactionary approach was not effective anymore. A new framework would help us be intentional in monitoring the external environment, so we could pivot as needed.

Through extensive discussions with the USAID/Lebanon mission and consortium partners, the team agreed that Lebanon's volatile context was the primary cause of operational uncertainty. We felt strongly that we needed to develop a tool that helps to monitor the context and forecast scenarios through the lens of the project's goal. Striking the right balance between being agile and adaptive, and staying on track with the project's overarching objective became the goal.

As a team, we were drawn to the CLA approach due to its built-in flexibility. The approach fits within our existing management processes and tools, avoiding the need for a completely new system. As part of our planning and reporting, we have monthly progress meetings with the ministry and weekly meetings with USAID. We also submit weekly progress reports, weekly notes capturing major activities, and achievement reports to USAID. To make CLA work, we had to simply tweak the existing planning and reporting templates to capture challenges, proposed adaptations, and impact on activities.

3. How: Tell us the story of how you used a collaborating, learning and/or adapting approach to address the organizational or development challenge described in Question 2.

We collaborated with USAID and the consortium partners to develop the adaptive management framework. This created collective buy-in and infused adaptiveness into the project.

Prior to bringing everyone together at a participatory workshop, we brainstormed key elements of our framework with our USAID Agreement Officer's Representative. To capitalize on the strength of our existing management systems, we reviewed planning documents (annual work plans, monitoring, and evaluation plans) and weekly and quarterly reports to see how adaptive management could be built into them. We saw some clear linkages, such as making context monitoring part of a strong monitoring system and using our periodic 'pause and reflect' sessions for continuous learning and improvement.

With the broad strokes of the framework in place, we hosted a two-day workshop that included: (i) participatory reflection, (ii) context indicators, (iii) scenario planning, and (iv) pathways to implementation creation. The objective of the reflection exercise was to gain deeper understanding of CLA in the program cycle, co-create the framework, and collectively reflect on the activity work plan and how they are impacted by changing scenarios.

After the reflection exercise, we dove into the context indicators, which help us identify trends and sense early warning signs of potential changes. This step was crucial as it informs scenario planning. We agreed that political conditions, economic conditions, security conditions, and health conditions were critical contextual factors impacting implementation. Our final step for context monitoring included reviewing each factor and assessing changes over the last six months.

Once the context indicators were in place, the next step was for the scenario planning exercise. The idea was to look at various combinations of external factors and envision what their joint influence would mean in terms of classroom learning. To keep things manageable yet powerful, we decided to prioritize factors in terms of perceived influence and then work with the two most important ones: political and economic conditions. We traced them onto a 2x2 matrix and ended up with four possible scenarios:

(i) Limited learning – a combination of low political but high economic stability meant that while our programming could exist, we could not depend on government support.

(ii) Expanding education – a combination of high political and high economic stability would enable us to expand programming and social innovations while working with adequate government support.

(iii) Shaky schooling – a combination of high political and low economic stability meant continued programs, but unreliable implementation due to frequent school closure.

(iv) Closed classrooms – a combination of low political and low economic stability saw a system breakdown when education programming ceased altogether.

From the matrix, it was apparent that from the start of QITABI 2 to the present, we moved from scenario 2–expanding education to scenario 3–shaky schooling because of the persistent social burden of the financial crises. The final step was to identify how we could still achieve core project objectives under each new scenario. As part of the scenario-based activity review, we discussed the opportunities and threats for each of our project's intermediate results and the activities to attempt or to pause. This allowed us to be operationally prepared for alternative courses of action if the situation deteriorates.

The real strength of our approach was tested during the pandemic. While we had included health factors as one of the influential external factors, we had underestimated its impact. In March 2020, when the ministry ordered school closures, the team sprang into action with scenario planning. We substituted the game-changing factors in our 2x2 matrix and planned activities under the "closed classroom" scenario. With our previous CLA experience, we successfully pivoted and submitted a contingency plan to USAID.

4. ORGANIZATIONAL IMPACT: How has collaborating, learning and adapting affected your team and/or organization? If it's too early to tell, what effects do you expect to see in the future?

The process of collaboratively developing the framework led to visible changes in our people and processes. First, the entire exercise of developing the framework has yielded a QITABI team of reflective practitioners. With a solid framework in place and after successfully pivoting in response to the civil unrest and the COVID pandemic, team members are now trained problem solvers. We are seeing a pattern of mini-scenario planning sessions within programs, monitoring and evaluation, operations, and field implementation teams. At a macro programmatic level, we now have Intermediate Result-specific contingency plans for literacy, numeracy, social and emotional learning, and systems strengthening. More recently, the team used the scenario planning tool to develop the annual work plan, reflecting on context indicators and developing scenario-based work plans to capture implementation risks and assumptions.
Second, we saw marked changes in our operational processes. Structured and unstructured pause-and-reflect sessions take place regularly. We see frequent discussions and assessments about operating context and its impact on implementation and the team. The field-based teams have also adopted these processes through their relationships at the school level. Our program reporting has elevated from scheduled reporting to continuous learning and knowledge management reporting. The quarterly report now includes a matrix that captures the enabling conditions with indicators along with situation descriptions from the current month, last month, and two months prior. Based on this information, a succinct analysis is provided on the trends observed. Further, weekly reports for the mission capture challenges, mitigation, and adaptation at the Intermediate Result level.

Our engagement with the USAID mission has also improved. The mission holds regular planning meetings with the project leadership team. A standing agenda item in meetings with the Agreement Officer's Representative is to revisit the context indicators and scenarios.

5. DEVELOPMENT IMPACT: How has using a CLA approach contributed to your development outcomes? What evidence can you provide? If it's too early to tell, what effects do you expect to see in the future?

With adaptive management embedded in our process, we successfully submitted a contingency plan to USAID/Lebanon within three weeks of school closing (post-COVID).

As a direct result of the CLA approach, we launched two important studies: a situational analysis on the impact of the multiple crises in education and a learning loss study to measure students' learning levels, since the reading and math baseline data collection was on hold. Both went through several adaptations including condensing the assessment tool, reducing the sample size, and using online modes of data collection.

Results from the studies informed QITABI 2's programming, such as making materials more accessible to students and providing books and math manipulatives to families who did not have access to technology. The results also showed evidence of food insecurity due to the Lebanese currency devaluation and rising hyperinflation affecting the availability and cost of food. Therefore, QITABI 2 distributed non-perishable food parcels to vulnerable primary school students and families. This helps ensure that students have access to nutritious food so they can be successful academically.

QITABI 2 is now working with the ministry on a learning recovery program. We have restructured the curricula using a multi-year approach to address learning gaps in early grades. Results from the learning loss study showed that students in the early grades did not acquire basic skills because of persistent school closures. It is early to determine the extent that our approach contributed to the development outcome. However, we can say with a high degree of certainty that if our activities had stopped due to the many crises, student learning outcomes would be much lower. We are optimistic that implementing in-school training and coaching activities for two full academic years will result in more students moving from beginner to intermediate levels for reading and math.

6. ENABLING CONDITIONS: How have enabling conditions - resources (time/money/staff), organizational culture, or business/work processes - influenced your results? How would you advise others to navigate any challenges you may have faced?

Our strong relationship with USAID Lebanon mission was the main enabler because they nurtured a culture of adaptation and inspired us to embrace CLA. Another key enabler was the strong relationship among consortium partners. The two-day workshop set a solid foundation for the team to become reflective practitioners and problem-solvers.

QITABI 2 is a huge project with a network of 150+ staff. We foresee that scaling up CLA could be challenging. To address this, we are using the “social contagion” strategy. This strategy focuses on spreading ideas, attitudes, or behavior patterns through imitation and conformity. We are promoting reflective sessions during all team meetings. Teams now talk about how decisions were made in the past, and how scenario planning now is helping achieve project objectives.

Another challenge is Lebanon’s data-poor environment, so we are monitoring the context using proxy variables. The situation is further complicated by limited access to school data. To solve this, we are accessing reports from local think tanks and academia. The project team sits on ministry committees and in donor coordination groups to ease this hurdle.

To navigate challenges, it is important to not be overwhelmed. Sometimes the context changes rapidly, and solutions aren’t perfect. The best strategy is to be prepared to pivot quickly. Adaptive management is not about changing goals. It is about changing the means to those goals. When needed, all should be prepared to take another path that is conducive to the changing context. We pivoted to distance teaching to ensure enhancement in student learning. If the situation deteriorated and distance teaching was not possible, we were prepared to teach at the local level through community-based organizations. Lastly, it is important not to be obsessed with structure and protocol. Collaboration can be informal and impromptu. Consensus is not always through organized workshops.