Tips to Adaptively Manage in Dynamic Contexts

These tips are part of a series of tips and resources to support context-driven adaptation in programming. For other resources, see the Context-Driven Adaptation Collection at https://usaidlearninglab.org/context-driven-adaptation-overview (internal staff version at https://programnet.usaid.gov/collection/context-driven-adaptation) or the Google Doc versions here.

This note collects a few tips, from those who have managed partnerships as AORs or CORs, on how to effectively manage an activity that is intended to adapt to the power dynamics and incentive structures of its context as they change, or "Think and Work Politically."[1] While much attention has been paid to reducing barriers and setting up mechanisms to better work in this way (including some other tips) and on adaptive management in general (including through USAID's Collaborating, Learning and Adapting or CLA approach), proactively undertaking this role is less studied. This note aims to suggest some ways of thinking and approaching management of USAID programming that can allow such activities to function as effectively as possible.

1) **Foster a sense of teamwork and partnership, rather than traditional donor/recipient power dynamics**. While some of this comes from the award itself, it is a key part of the management relationship. In any good partnership, both partners are invested in the shared outcome, and both partners bring distinctive value-added to the effort. Recognize and appreciate your shared investment in development outcomes and your respective value-added. Much social change programming is more akin to supporting a long-term movement for change than delivering a particular good or service, and so a "movement mentality" can be useful in this work, where our efforts are in synch with those of many others towards meaningful high-level goals. Consider how you can help your partner succeed, since their success is also yours. If you are regularly asking "what more can I do?" then it's more likely that your partners will also.

2) **The nuts and bolts of award compliance needs to be well-established and a solid base**. While this should rarely require significant attention, you should transmit baseline expectations of excellent compliance. Make it clear that you expect compliance as a minimum, but you're interested in successes that cannot be achieved by compliance alone.

3) **Trust needs to be constantly fostered**. Get to know your partners and other key stakeholders, and learn their background and motivations for collaborating on the issue or challenge you're tackling. Be transparent about your questions and validating suggested changes in direction with further data. Show your partners why you personally care about these issues, and encourage them to see you as more than just an award manager, but as a committed development professional.

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[1] https://twpcommunity.org/

4) **Model curiosity and sensitivity about the context and how it is shifting.** Acknowledge from the beginning of an activity that there will be contextual changes over its life, and that that all is not knowable in advance. When you project the sense that the problem we're helping to tackle is first and foremost a collective one, and that our resources can catalyze or accelerate meaningful social change, but not cause or control it, you help to reinforce trust and set up management conversations that focus on "what more could we be doing" grounded in the realities of the political economy of the sector or issue.

5) **Agree upon structure and timeline (and/or trigger points) for discussion on adapting**. At a minimum, this should be a quarterly data review, but monthly meetings may be helpful, or other trigger points that can be collectively identified. Some of these may benefit from more diverse input, such as from an advisory council. Where a set workplan structure for learning about shifts in context is aligned with a sense of teamwork, it greatly facilitates using data together.

6) **Triangulate your information about adaptation.** Decisions about shifts in programming should reflect input gathered from a number of perspectives. Such decisions are rarely obvious, so consideration of different views is important to think through it carefully. Make it clear to your partners that your concurrence with shifts will mean that you need them to explain (and document - see below) why they suggest approving a change in direction. At the same time, don't treat this as a burden of proof - your role as AOR/COR is to agree that it's an informed decision, not to litigate any change.

7) **Work closely with your OAA team** - ensure that there is clear, concise communication; that your A/CO is aware of any issue (no matter how seemingly small) that could possibly affect the activity, and loop in your A/CO in early and often. Allow the A/CO to be a champion for the activity- include the A/CO in meetings with the partner, site visits, etc. - so that the A/CO is able to better understand what it is you're doing and why it is important. As you develop the activity design, work with your A/CO to consider mechanisms that support CLA (here are some examples of co-creation and adaptive mechanisms). If your A/CO does not have direct experience with adaptive mechanisms, connect him/her with A/CO colleagues that have to better socialize how they work and address any questions/concerns.

8) **Document decisions made.** More will always be known about any adaptation decision in hindsight - including whether the adaptation proved to be a good idea. Clear and careful documentation of decision-making can demonstrate your integrity and logic in decision-making, show why the decision made was reasonable and supported by available information, and limit vulnerability to second guessing. This is also critical for the next generation of managers who will oversee the effort but will not have been part of the initial conversation that led to the adaptation.

Some examples of how these approaches were put into practice include:

From [USAID/Morocco's winning 2017 CLA case study:](#)

"USAID/Morocco's experience demonstrates effective ways of incorporating CLA into already-existing processes and then shows how one small change, presenting the "State of the Mission Address," can have a large impact on incorporating a larger CLA approach. This year, the Mission closed a feedback loop by holding a presentation, dubbed the "State of the Mission Address," to report back to implementing partners on their annual reports. We focused the presentation on explaining how the Mission uses the information provided in the reports and then shared powerful examples from those reports on learning and adaptive management. We chose to focus on learning and adaptive management because we had updated our quarterly and annual report templates last year to include sections on learning and adaptive management. This simple exercise allowed us to provide continued learning on CLA, highlight best practices and lessons learned, and shine a spotlight on the great work that our partners are doing. It allowed staff and partners to learn more about what each of our partners is doing. We also believe that it will serve as an inspiration for implementing partners to improve the quality of information they are providing to us in quarterly and annual reports."

From [USAID/Jordan's winning 2017 CLA case study:](#)

"...the Mission identified a need for enhancing collaboration between evaluation team members and USAID activity managers to ensure that evaluation recommendations were developed and worded in ways that would increase the likelihood of their utilization for improving programs. Despite initial concerns that increased involvement of USAID staff in the recommendations development and revision process could undermine the independence of the evaluation team, a new workshop was added to the overall evaluation process where evaluation stakeholders would collaboratively co-generate the final recommendations after the evaluators had finalized their key findings and conclusions. As a result of all stakeholders' openness to continuous learning and improvement, these workshops, attended by USAID technical managers of the activity being evaluated, the evaluation team members, Program Office (PRO) staff, and staff from the Mission's Monitoring and Evaluation Support Project (MESP), implemented by MSI, have resulted in perceived improvements to the utility of the final recommendations without undermining the integrity of the evaluation process. More useful recommendations are expected to facilitate more efficient and effective utilization of the evaluation results for adaptive management by Mission and implementing partner staff, resulting in improved development outcomes for the people of Jordan."