Pact is the promise of a better tomorrow for communities challenged by poverty and marginalization. We serve these communities because we envision a world where everyone owns their future. To do this, we build systemic solutions in partnership with local organizations, businesses, and governments that create sustainable and resilient communities where those we serve are heard, capable, and vibrant. On the ground in nearly 40 countries, Pact’s integrated adaptive approach is shaping the future of international development. Visit us at pactworld.org.

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Introduction

This document provides practical guidance to development practitioners globally on the mindsets, behaviors, resources, and processes that underpin an effective adaptive management system. It presents an approach to managing adaptively that is rooted in complexity analysis and program theory. It draws on Pact’s global experiences and work on topics as diverse as health, livelihoods, markets, governance, capacity development, women and youth, and more.

This document begins with an introduction to adaptive management, then walks through successive steps to determine how much adaptation a project requires and how to design an appropriate system. These steps for executing adaptive management are:

1. Determine your project’s degree of complexity
2. Determine your strategy to respond to that degree of complexity
3. Determine leadership, staffing, and resource needs
4. Establish your adaptive management process
5. Implement and evaluate your plans

The second half of this guidebook contains a toolkit of examples and templates that projects can tailor to their needs:

1. Adaptive Management Intensity Self-Questionnaire
2. Staff Roles and Responsibilities in Adaptive Management
3. Scenario Planning Decision Matrix and Template
5. Reflection Meeting Template
6. Learning and Reflection Meeting Agenda Template
7. Guide to Preparing for Learning Reviews
8. Decision Tracker for Adaptive Management
Understanding Adaptive Management

What is “adaptive management”? What makes great international development project managers so effective? Most likely they keep their eye on the ultimate goal and regularly ask themselves the “so what” questions. They probably are adept at taking manageable risks. They undoubtedly track indicators, use data effectively, and deploy resources to maximize impact. They also monitor the external operating environment to seize new opportunities and navigate emerging threats. Great managers also encourage their teams to think and act in a similar way, knowing that managing a complex project in a shifting world requires a coordinated team effort; every team member has a role to play because every action and decision has a cumulative effect on the project’s success.

In short, the best project managers manage adaptively. They have an agile mindset that recognizes that complex problems cannot be overcome in a linear fashion. This mindset is supported by structured processes and mechanisms for using evidence to inform the pivots we make.

Why should we manage adaptively? All projects operate with some level of uncertainty. For example:

- Key champions in government may be replaced by someone who blocks progress to project goals.
- Monitoring data reveals that planned activities are not contributing to expected results.
- A typhoon may change a community’s needs from environmental advocacy to emergency assistance.
- A change in vaccine supplier may triple the costs of one project activity.
- Conflict may break out in one project location.

Projects experience different types and levels of uncertainty. But, regardless of project and context, we cannot know everything and we must expect project conditions to evolve. The systems in which projects operate are unique and constantly evolving, some more quickly than others.
others. We owe it to those we serve to be inquisitive, intentionally learn from our mistakes, use resources as efficiently as possible, and take measured risks to achieve impact. In short, we owe it to those we serve to manage adaptively based on evidence.

“How of course we are trying to accomplish what is in the Annual Work Plan … But if we find that there are things that are more impactful, we will tweak activities and plans based on our analysis of the data.”
MONITORING AND EVALUATION (M&E) DIRECTOR, PACT TANZANIA

How do we manage adaptively?

Adaptive management occurs when sound analysis and reflection meet project decision-making. Rigorous analysis goes nowhere if team members do not have the time to reflect on findings and the ability to change programmatic direction. Similarly, without sound analysis of data, team members do not have enough information to know whether they need to adapt and, if so, how they should do so.


- **Review** processes provide accurate and timely information about both project performance and the external operating environment.
- **Reflection** processes create space to make sense of available information and for implementers to update their understanding of what is needed to achieve results.
- **Response** processes include formal and informal mechanisms to change course as required.

The RRR process’ elements should be understood as interdependent and mutually reinforcing (see graphic at right). For example, just as review processes furnish the information needed to reflect on programmatic needs, reflection processes identify remaining data gaps that may require additional research and learning. Similarly, programmatic responses set in motion a new RRR cycle, becoming the basis for further critical review and reflection.

**ADAPTIVE MANAGEMENT AND THE PRIVATE SECTOR**

Adaptive management approaches are not the development sector’s exclusive or even primary domain. Private sector companies recognize that the complexity of markets and high levels of competition render static strategic planning processes obsolete. According to one article, increasingly, “[companies] that thrive are quick to read and act on signals of change. They have worked out how to experiment rapidly, frequently, and economically — not only with products and services but also with business models, processes, and strategies.”


Rapid assessments, performance monitoring, and in-depth research are all ways in which projects can rigorously collect and analyze data to generate useful evidence about the project context, theory of change, and implementation and operations.

Through management meetings, learning summits, pause and reflect sessions, and scheduled site visits, projects should review and analyze evidence to determine its meaning for the project’s progress and how it should proceed.
Operationalizing Adaptive Management

In order to successfully operationalize the RRR process, projects need enabling mindsets, resources, and processes, all leveraged into effective adaptation with sound leadership. Like the three Rs, these elements are mutually dependent. Resources and processes provide the hardware and infrastructure that enable project flexibility and can enable and reinforce the more-intangible elements of mindsets and leadership. However, in the absence of a conducive culture and empowering management team, even ample resources and carefully designed processes will not contribute to adaptive, evidence-based programming.

**Mindsets**

Adaptive management is led by project teams, managers, and leaders who are open to new information, approaches, and ideas. Adaptive management cannot be outsourced to external partners or consultants; it depends on the cumulative and everyday actions of those involved in a project, from the communities it serves to project directors to technical and operational support. Flexible programming approaches thrive within teams that welcome open and critical discussion of challenges and opportunities. Project managers who are not open to receiving constructive criticism about the project or to reconsidering prior assumptions cannot manage adaptively.

**Resources**

There are two basic resource considerations for projects committed to adaptive management. First, projects must ensure that they include sufficient resources to support necessary research, learning, and review activities. Well designed, effective data collection and analysis processes need not be resource intensive. However, projects in especially volatile contexts or facing especially challenging information environments may require larger budgets for research and analysis. Second, projects must ensure that they include resource flexibility to enable them

---

**Best Practices for Operationalizing Resources**

- Ensure sufficient budget for adaptive management activities, and build in budget flexibility when possible.
- Develop strong working relationships with funders or organizational leadership to keep communication open in case approval to re-align budgets or activities as needed.
- Include finance, grants management, and administrative staff in all RRR processes.
- Build adaptive management activities into annual work plans.

---

**Best Practices for Operationalizing Mindsets**

- Challenge yourself, and interrogate your context and project.
- Be explicit about your assumptions and continuously question them.
- Encourage team members to be curious and critical.
- Hire for certain traits and mindsets, and build adaptive management into job descriptions.

See TOOL 2: Staff Roles and Responsibilities in Adaptive Management in the Toolkit for suggested job description language and interview screening questions.
to shift programmatic activities to meet evolving needs. This means being able to reschedule, alter, drop, or test activities in order to meet the project’s goals.

**Processes**

Adaptive programming depends on the regular flow of information about project performance and the external environment and on **intentional** processes that use that information. Operating within budget and staff constraints, projects should design processes that meet their information needs and create space for structured reflection and decision-making. Some projects may require robust research, while others may be able to rely on already-available secondary or project data. And, while all projects should institutionalize processes for reviewing and reflecting on evidence to decide whether and how to adapt, the frequency of reflection will vary according to the project’s complexity.

Projects also should develop **inclusive** processes. Adaptive management is not something that is done to the project, its team members and partners, or communities, but rather is done with those actors. Projects should have intentional approaches for collecting critical feedback from project stakeholders.

**Leadership**

While every single team member contributes to successful adaptive management, experience shows that effective leadership is critical for project success. Managers must be able to drive the RRR processes, but the project’s leadership sets the tone for critical reflection, inspires teams when the evidence shows that adaptation is necessary, protects and enables its teams, and builds a cohesive unit that can communicate, share, and help each other adapt.

**Executing Adaptive Management**

Now that you have a sense of what adaptive management is and what it involves, let’s develop a system that meets your project’s needs. The following is a snapshot of what the remainder of this guide will take you through.

**At a Glance**

1. Determine your project’s degree of complexity.
   - Identify your project’s level of complexity using **TOOL 1: Adaptive Management Intensity Self-Questionnaire**.

2. Determine your strategy to respond to that degree of complexity.
3. Determine leadership, staffing, and resource needs.

Determine how to facilitate a whole-of-team approach to adaptive management by referring to TOOL 2: Staff Roles and Responsibilities in Adaptive Management.

Consider the resources required for your adaptive management approach and explore how they are affected by different scenarios using TOOL 3: Scenario Planning Decision Matrix and Template.

4. Establish your adaptive management process.

REVIEW
Make sure your project can collect information on its operating environment by consulting TOOL 4: Context Indicators for Adaptive Management Guide.

REFLECT
Determine the content and flow of your reflection processes using the TOOL 5: Learning and Reflection Meeting Agenda Template.

Get the most strategic value out of your team meetings using TOOL 6: Reflection Meeting Slide Deck Template.

Be ready to probe deeply into project lessons using TOOL 7: How to Prepare for Learning Reviews.

RESPOND
Anticipate changes in your local context using TOOL 3: Scenario Planning Decision Matrix and Template.

Track and document your adaptive decision-making using TOOL 8: Decision Tracker for Adaptive Management.

5. Implement and evaluate your plans.

Step 1: Determine your project’s degree of complexity

What determines how much we should be prepared to adapt?

Most projects already have in place key elements of an adaptive management system: they collect project data, consider the external environment, conduct midterm or other learning reviews, and so on. To turn these disparate activities into a truly adaptive project, teams need to apply them in a fully coherent and intentionally connected manner.

Remember that the goal of an adaptive management approach is not to have more programmatic change, but to know whether change is necessary, to make decisions based
on evidence, and to be proactive rather than reactive in service of long-term impact. For this reason, any adaptive management system must be tailored to the specific project’s needs. You can determine the right approach by answering the following questions.

- **What is our level of certainty regarding the operating environment?** Some projects are implemented in highly dynamic or even volatile economic, political, natural/ecological, or security environments. In these situations, it is sometimes difficult to understand a problem’s root cause or the problem may shift during the life of project. Such projects must be able to change approaches or scope quickly in response to emergent threats and opportunities. By contrast, other projects operate in relatively stable situations, where economic, political, natural/ecological, and security concerns have little to no impact on how the project is implemented or whether it can achieve its desired results. Our understanding of this environment and how it contributes to the overall system that produces the problem we are trying to address is called the **Theory of Context**.

- **What is our level of certainty of what needs to change to address our problem?** Some projects know exactly what needs to change to address the main problem. Here, the cause-effect relationship is extremely clear and best practices are established. Other projects do not know exactly what must be changed to address the problem, so problems tend to remain or can evolve into new problems. For example, we might not be able to foresee which would contribute more to women’s decision-making role in politics: a different legislative seat allocation system or a different candidate nomination process. Our understanding of what change should occur to address the problem and its degree of certainty is called the **Theory of Change**.

- **What is our level of certainty regarding our project approach (strategy and activities)?** Some projects may implement highly evidenced, well-rehearsed approaches that we know will result in the desired change, thus requiring little in the way of testing or modification. By contrast, there may be significant uncertainty in other project approaches and some may even be experimental in nature. In such projects, we are not sure that our activities will result in the change we think needs to happen to address our problem and achieve our objectives. Most projects need to decide what activities to prioritize given finite resources. For example, should a project prioritize financial literacy or access to affordable sanitary products in service of female empowerment? Our understanding of our project approach and how it achieves the change we desire is called the **Theory of Action**.

Together, these three elements constitute a **Program Theory**.
A solid program theory helps determine the adaptive management approach.

<table>
<thead>
<tr>
<th>THEORY OF CONTEXT</th>
<th>THEORY OF CHANGE</th>
<th>THEORY OF ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SAMPLE PROJECT ONE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A mostly stable and well understood project context, but uncertainty around how legal restrictions may impact the project’s ability to serve certain marginalized groups</td>
<td>Significant evidence of how to improve HIV/AIDS services and health-seeking behavior</td>
<td>Significant experience and evidence about which activities will contribute to target outcomes</td>
</tr>
</tbody>
</table>

| **SAMPLE PROJECT TWO** | | |
| A project that aims to expand community-based justice services in Somalia may have: | | |
| A highly volatile contextual environment marked by political instability and violence, affecting the ability to implement activities | Limited evidence about how best to sustainably increase community-based justice services in the context of Somalia | No practical experience applying these specific activities to achieve target outcomes in Somalia, thereby requiring piloting of novel approaches |

To help project teams establish how much they should be prepared to adapt and, as such, the best approach, Pact built off Program Theory and the Cynefin Framework to create its Program Complexity Framework, which is oriented around four “domains” of increasing complexity: Simple, Complicated, Complex, and Chaotic. Few projects will fall cleanly into one of these categories, or they may shift categories over time as the context or project objectives change.

To help you determine whether your project should be considered simple, complicated, complex, or chaotic, complete Tool 1: Adaptive Management Intensity Self-Questionnaire in the Toolkit.

---

1 IBM developed the Cynefin Framework in the 1990s to help project managers make sense of the level of certainty and dynamism surrounding their activities and context. Since, it has been adapted and repurposed across industries, including the international development sector, to help decision-makers label and situate themselves within their environments. See: David J. Snowden and Marie E. Boone. 2007. A leader’s framework for decision making. *Harvard Business Review* 85(11): 6–76, 149.

2 This table is adapted from Snowden and Boone, 2007.
Step 2: Determine your strategy to respond to that degree of complexity
What should I be prepared to do, depending on my project’s degree of complexity?

Align your adaptive management strategy to the degree of complexity you face, as summarized in the following graphic.

**SIMPLE**
Simple operating environments and associated problems have highly evidenced theories, so project strategy can rely on **proven best practice**.

**COMPLICATED**
Complicated operating environments and associated problems have well-evidenced theories, though they may not be applicable to a given context. Projects can use existing evidence as guidance, tailored to the context. Such projects can rely on **good practice** in their strategies.

**COMPLEX**
Complex operating environments and associated problems do not have well-evidenced theories, so projects have little ability to transfer successes from one context to the next. Projects must rely on **emergent practice** by testing and scaling to ensure that theories are correct.

**CHAOTIC**
Chaotic operating environments and associated problems have little to no evidence to develop theories of change. Project strategy must rely on **novel practice** and consistently test and adapt approaches.

These four strategies reflect that the uncertainty you must address within the operating environment or within your technical intervention will influence a wide range of adaptive management considerations. These considerations could include the frequency at which you monitor the environment and update your project’s theory of change, the degree of budget flexibility required, or the type of M&E approaches employed.
The table below is a “cheat sheet” of key considerations and components to consider when designing an effective adaptive management system based on the project’s level of complexity.

<table>
<thead>
<tr>
<th>Activity Adaptation</th>
<th>SIMPLE</th>
<th>COMPLICATED</th>
<th>COMPLEX</th>
<th>CHAOTIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>What level of adaptation should you expect for project strategies or activities?</td>
<td>Low: minimal to never</td>
<td>Moderate: occasional, at least yearly over the life of the project</td>
<td>High: frequent, multiple times a year</td>
<td>Very high: frequent, week to week</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Theory Review</th>
<th>How often should you review and potentially revise the theory of context, change, or action?</th>
<th>Annually</th>
<th>Quarterly to annually</th>
<th>Monthly to semi-annually</th>
<th>Daily to weekly (alternatively, no theory is used at all)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Budget Flexibility and Content</th>
<th>How flexible does your budget need to be to allow for adaptation? What additional items should you consider including in your budget during project design or modifications?</th>
<th>Low: Ensure there is a reasonable degree of flexibility to adjust staffing levels, services, and activities.</th>
<th>Moderate: Budget for flexible technical assistance and adjustable intervention approaches.</th>
<th>High: Budget for rapid response mechanisms, means of piloting and testing interventions, and flexible technical assistance.</th>
<th>Very high: Budget similarly to complex, but plan for smaller, more experimental activities.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Monitoring Framework</th>
<th>What monitoring framework is the most appropriate for projects with different adaptive management needs?</th>
<th>LogFrame</th>
<th>LogFrame (with commitment to adapt), Most Significant Change</th>
<th>Outcome Mapping, Most Significant Change</th>
<th>Developmental evaluation or similar</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Evaluation Design/Approach</th>
<th>What evaluation design is the most appropriate for facilitating decision-making and adaptation?</th>
<th>Experimental, cause-effect, theory-based evaluation, social return on investment (SROI)</th>
<th>Experimental, Outcome Harvesting, Contribution Analysis, SROI</th>
<th>Non-experimental, Outcome Harvesting, Outcome Mapping, Process Tracing, Realist Evaluation</th>
<th>Non-experimental, goal-free evaluation, developmental evaluation</th>
</tr>
</thead>
</table>

3 Monitoring frameworks are designed to meet specific needs and are a factor of the context at hand and the project’s complexity. Highly evidenced projects will be able to use a LogFrame, whereas highly adaptive projects would not find LogFrames useful. This list is illustrative, not exhaustive. Monitoring framework decisions also depend on the funder. It is possible to merge different approaches. For example, a LogFrame may be combined with Outcome Mapping, whereby a LogFrame indicator could include Outcome Mapping graduated progress markers.

4 The most appropriate design always depends on the question of interest. This table provides general suggestions and is not to be taken as a methodological rule.

**NOTE:** Please recall that a successful adaptive management system requires the support of all staff. Your staffing structure should depend on staffing resources and the needs of your adaptive management system. At the same time, your adaptive management system must be designed in a way that works for your existing staff structure and resources.
Step 3: Determine leadership, staffing, and resource needs

What inputs do I need to secure to support my project’s adaptive management system?

As we noted in our discussion of mindsets, who we have on our team and their ability to reflect critically and adapt based on evidence will affect whether and how we adapt. In order to promote the right mindsets and skillsets within our team, projects can:

- Include adaptive management functions in all relevant job descriptions. For highly complex projects, include these functions for all staff, from drivers and administrative assistants to project leaders.
- Explicitly hire for adaptive management competencies
- Identify where you will need to leverage external experts (i.e. consultants) to complement staff skills and bandwidth
- Prioritize capacity development opportunities for staff and project stakeholders that build analytical and flexible decision-making skills

Projects also need to budget appropriately. Staff responsible for developing budgets should be included in designing the adaptive management approach to ensure effective resourcing of necessary staff and analytical and reflection processes. The degree of flexibility you have in your budget depends on your organizational or contractual obligations. To the maximum extent possible, during project design or subsequent modifications, build flexibility into your budget by including mechanisms such as rapid response funds (funds set aside for rapid dispensation to respond to a sudden need) or pools of funding for demand-driven technical assistance (funds set aside for access to individuals with specialized expertise to support unexpected technical needs).

Projects also can develop costed scenario plans. If there are clear decision points that a project expects to reach that depend on expected changes to the context, an intentional and costed scenario planning exercise will prepare the project to budget appropriately.

All projects, particularly those in complex and chaotic environments, should build strong relationships with those inside or outside their organization who have decision-making authority over budgets and other authorizations to enable feedback and quick decisions when necessary.

Scenario Planning

Imagine a project that prepares volunteers to effectively observe an election. The project approach is built around a cascaded training model that assumes that final regulations are issued at least three months before election day. Suppose that regulations are not issued on time, requiring the project to develop election observers’ capacities within a compressed time period. The project team may proactively identify that, under this scenario, they would need to adapt by directly delivering trainings to election observers instead of training master trainers who then train the volunteers, per the cascaded training model. Because the operating context is likely to be volatile in the months preceding an election and such a context might necessitate drastic changes in programming, the project should be prepared for this and similar scenarios.
Step 4: Establish your adaptive management process

What process should a team establish to enable adaptive management?

The best process will differ for each project team depending on resources (budget, staffing) and the degree of project complexity. However, all teams need an initial plan. We recommend that each project have an established plan and schedule to **Review** and **Reflect**. Based on these, the team should then put in place the mechanisms to **Respond**.

Most projects detail their system for **REVIEWING DATA** in an **M&E plan**, which may be called something else, depending on the funder or context (e.g., Activity Monitoring, Evaluation, and Learning Plan). Whatever system the team uses to track and report on results, ensure that it includes a plan for collecting all the data that the project expects to need for adaptive management purposes.

For example, complicated, complex, and chaotic environments will require more context monitoring to update their theories of context and change. One way to do this is to design and track context indicators, including sentinel and trigger indicators, in your M&E plan.\(^5\)

Similarly, complex and chaotic projects rely more on testing approaches to validate their theories of action before scaling. Be sure such projects have built in time and budget to test and assess, that the project design explicitly allows for adaptation depending on the testing results, and that the M&E plan includes the necessary activities to do so. If your M&E plan does not include these components, seek approval to revise it or establish an informal plan to follow alongside it.

The project's plan for **REFLECTION** should be contained in the **project strategy** or **work plan**. It should establish regular and intentional moments when team members assess the findings or evidence about the project performance or context and make decisions about what the project needs to do. These can be anything from weekly team meetings to yearly learning summits to midterm programmatic reviews. Set a straightforward schedule that includes all planned moments, assign responsibilities, and document the results from previous responses and the decisions made about how the project will respond.

Reflection moments also may include discussions related to developing or triggering **scenario plans**. Many projects benefit from regular scenario planning as part of their reflection plan to allow teams to proactively identify how programming may need to change in response to changes in the operating environment.

\(^5\) A context indicator tracks changes to the programming environment. Sentinel and trigger indicators are sub-types of context indicators: a trigger indicator triggers a specific programmatic action when the environment reaches a certain point, and a sentinel indicator is a type of early warning indicator that warns the project of potential contextual changes that may affect it. See Tool 4 for more information and examples.
Projects also should pay attention to the sequence of key reflection activities. For example, annual learning summits and certain research or analysis exercises should be scheduled before or as the first part of work-planning.

While reflection activities should be planned at the outset of the project, expect to adapt your system to meet your needs. Perhaps you need more or fewer meetings, or you need to adapt the meetings’ content as needs change. For example, during an election period or following an action-forcing event, you may opt to meet more frequently for review and reflection.

How the project team responds will depend on the evidence and what is decided during the reflection moments. Responses may entail:

- Adding new activities, such as using a rapid response grant fund to support urgent advocacy or facilitating a workshop for project stakeholders based on an emerging capacity need
- Building new relationships, such as identifying and strategically engaging government stakeholders, civil society organizations, or community groups whose support is necessary to achieve project outcomes
- Shifting geographic focus, such as moving resources from one area to another to maximize resources in places where the project has gained traction for change or sees a window of opportunity
- Dropping or adding strategic approaches, such as shifting focus from the legislature to a particular ministry

Some of the responses will be part of expected project management, while others may require a rethinking of how resources are allocated. As noted in Step 2, projects can embed flexible mechanisms into their budgets, such as rapid response funds or flexible technical assistance pools. These mechanisms provide resources that are not pre-committed, allowing projects to engage in new or different activities without modifying other aspects of the project.
Projects should track decisions that were made and the resultant actions taken, then consider whether the action resolved the need. Successive meetings or reviews should reflect on whether that adaptation was sufficient to resolve the challenge or if more is necessary. Tracking these adaptations and their relative success is important to project learning and can be shared externally to increase the sector’s evidence base.

**Step 5: Implement and evaluate your plans**

Now that you have established your project’s degree of complexity (step 1), how much you should adapt (step 2), what staffing and resources you need (step 3), and what process you will implement (step 4), it is time to Review, Reflect, and Respond.

Remember that the RRR process is iterative. After responding, the cycle begins again with reviewing.

Just as you should regularly review your environment, results, and activities, you should review your adaptive management system to ensure that it is meeting your needs. Consider:

- **Relevance**: Are you collecting enough or the right information to inform your RRR process?
- **Analysis**: Are you able to pull the information together in a way that enables constructive analysis?
- **Efficiency**: Are you spending enough or too much time reviewing information?
- **Staffing**: Are the right people reviewing the information?
- **Structure**: Are project team members appropriately organized to fulfill the system’s needs?
- **Capacity**: Does the project team need capacity-building support to carry out their adaptive management responsibilities?
- **Attitude**: Is leadership setting the right tone regarding constructive adaptation?

Reflect on questions like these at the end of periodic team meetings.

Because adaptive management depends as much on a team culture that embraces constructive adaptation as it does on clear processes and individual responsibilities, consider how to promote such a culture. Some suggestions are:

- Co-developing adaptive management processes to ensure buy-in and interest in the system
- Providing incentives for critical thinking
- Celebrating successful adaptations or the identification of critical challenges
- Recognizing strategic risks
- Acknowledging the importance of learning from failure

Leaders also should work to ensure that project stakeholders are both comfortable and confident engaging in adaptive management processes, which requires their comfort and confidence in acknowledging their uncertainty in a complex world.
Adaptive Management Toolkit

This section shares the tools and templates that Pact created for organizations and projects to practically apply adaptive management. The table below provides an overview of each tool in the order that they would be used in the adaptive management process.

<table>
<thead>
<tr>
<th>TOOL</th>
<th>WHAT IT IS</th>
<th>HOW TO USE IT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Adaptive Management Intensity Self-Questionnaire</td>
<td>This questionnaire assesses the operating environment and project goals' difficulty, then uses Pact’s Program Complexity Framework to determine whether your project should be considered simple, complicated, complex, or chaotic.</td>
<td>During project design or when reviewing your project’s adaptive management system, use this questionnaire to self-assess the project’s degree of complexity. The project’s designation as simple, complicated, complex, or chaotic then informs your project’s adaptive management strategy.</td>
</tr>
<tr>
<td>2. Staff Roles and Responsibilities in Adaptive Management</td>
<td>The table outlines suggested roles and responsibilities for staff in all project and organization offices. It also includes language for the “desired qualifications” portion of job descriptions and interview questions to help hire adaptive staff.</td>
<td>Review the roles and responsibilities for your department. If you are a project manager or team leader, review all roles and responsibilities to ensure that your team meets them. Include the suggested desired qualifications in all job descriptions.</td>
</tr>
<tr>
<td>3. Scenario Planning Decision Matrix and Template</td>
<td>This matrix and template facilitate regular scenario planning to proactively identify how programming may need to change in response to changes in the operating context.</td>
<td>At the project design stage, list the conditions that are important to a project’s implementation or overall success. Determine how important each condition is using the decision matrix. It suggests four options: stop the project, add new resources or strategies, create a contingency plan, or do nothing. Then, use the template to determine your scenario plan, including budgeting considerations.</td>
</tr>
<tr>
<td>4. Context Indicator Guide</td>
<td>This guide provides an overview of different types of context indicators, including sentinel, trigger, trip-wire, direct, proxy, and leading indicators, plus examples of each.</td>
<td>Reference this guide when developing M&amp;E plans to make sure you include indicators that measure the project’s operating environment and inform the project’s scenario planning processes.</td>
</tr>
<tr>
<td>5. Learning and Reflection Meeting Agenda Template</td>
<td>This template provides an outline for designing a learning review event.</td>
<td>The template includes suggested session details, outcomes, and times to spend on each. These depend on the total time you have for the meeting. Tailor this agenda template to the project’s needs and the meeting frequency.</td>
</tr>
<tr>
<td>TOOL</td>
<td>WHAT IT IS</td>
<td>HOW TO USE IT</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>6. Reflection Meeting Slide Deck Template</strong></td>
<td>This template is a starting point for designing a regular reflection meeting and should be tailored to meet the project’s needs and meeting frequency. Tool 6 complements Tool 7.</td>
<td>Tailor this template to guide reflection meetings. The template includes suggested time to spend on each section, but this is dependent on the total time you have for the meeting.</td>
</tr>
<tr>
<td><strong>7. How to Prepare for Learning Review Meetings</strong></td>
<td>This table complements Tool 6 with an illustrative breakdown of what to prepare and review at various learning review events that are held at different points during the project: bi-weekly, quarterly, annually, midterm, and endline.</td>
<td>Use this table to help design and prepare for learning reviews at any point in the project cycle. The table lists by meeting frequency who attends, purpose, questions to ask, data to prepare, and desired result. All elements of the learning review can be customized to each project’s needs and available staff.</td>
</tr>
<tr>
<td><strong>8. Decision Tracker for Adaptive Management</strong></td>
<td>This simple table helps projects track how and how well they are learning and adapting. Data from this tracker can be used to improve practices for downward accountability to stakeholders and for upward accountability to funders.</td>
<td>Complete this table following each quarterly, annual, or midterm learning review (or after bi-weekly meetings, as appropriate) as part of updating action items from the previous learning review.</td>
</tr>
</tbody>
</table>
**Pact’s Adaptive Management Intensity Self-Questionnaire**

Complete the following self-questionnaire to determine the degree of complexity and, therefore, the extent to which you should be prepared to adapt. Then, based on your responses, determine which degree of complexity you should expect by locating your results on Pact’s Program Complexity Framework.

### Adaptation Intensity Self-Questionnaire

<table>
<thead>
<tr>
<th>AREA</th>
<th>DEGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Difficulty of Operating Context</strong></td>
<td></td>
</tr>
</tbody>
</table>
| (1) Is your operating context relatively stable (calculable) as it relates to the project? (How often and to what degree is the project impacted by changes in the environment?) | 1 - Very stable  
2 - Moderately stable  
3 - Less stable  
4 - Not at all stable |
| Subtotal: | 1 = Low difficulty operational context  
2–3 = Moderate difficulty operational context  
4 = High difficulty operational context |
| **Difficulty of Project Goals** | |
| (2) Is your theory of change well evidenced? (The causal chain is proven, and you know exactly what sort of change is needed to correct the problem.) | 1 - Very evidenced  
2 - Moderately evidenced  
3 - Less evidenced  
4 - Not at all evidenced |
| (3) Is your theory of action well evidenced? (There are best practices, you have done those practices before in a similar context, and you know what activities will definitively achieve the necessary change.) | 1 - Very evidenced  
2 - Moderately evidenced  
3 - Less evidenced  
4 - Not at all evidenced |
| Subtotal (add sections 2 and 3): | 2–3 = low difficulty project goals  
4–7 = moderate difficulty project goals  
8 = high difficulty project goals |

### Program Complexity Determination Matrix

<table>
<thead>
<tr>
<th>DIFFICULTY OF OPERATIONAL CONTEXT</th>
<th>DIFFICULTY OF PROJECT GOALS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High</strong> (Subtotal score: 4)</td>
<td>Chaotic</td>
</tr>
<tr>
<td><strong>Moderate</strong> (Subtotal score: 2–3)</td>
<td>Complex</td>
</tr>
<tr>
<td><strong>Low</strong> (Subtotal score: 1)</td>
<td>Complicated</td>
</tr>
<tr>
<td><strong>High</strong> (Subtotal score: 8)</td>
<td>Chaotic</td>
</tr>
<tr>
<td><strong>Moderate</strong> (Subtotal score: 4–7)</td>
<td>Complex</td>
</tr>
<tr>
<td><strong>Low</strong> (Subtotal score: 2–3)</td>
<td>Complicated</td>
</tr>
<tr>
<td><strong>Chaotic</strong></td>
<td>Complex</td>
</tr>
<tr>
<td><strong>Complex</strong></td>
<td>Complicated</td>
</tr>
<tr>
<td><strong>Complicated</strong></td>
<td>Simple</td>
</tr>
</tbody>
</table>
## TOOL 2

### Staff Roles and Responsibilities in Adaptive Management

All staff, regardless of where they work, have roles to play in projects that are committed to learning and adaptation. The table below outlines suggested roles and responsibilities for members of each department and includes suggested key responsibilities and desired qualifications to include in job descriptions. Departments/teams will differ depending on the size of project team or organization and the project’s budget. These are illustrative examples, though high-level project management staff are responsible for ensuring all functions below are covered by existing staff.

<table>
<thead>
<tr>
<th>DEPARTMENT/TEAM</th>
<th>ROLE</th>
<th>RESPONSIBILITY</th>
<th>SUGGESTED JOB DESCRIPTION LANGUAGE</th>
</tr>
</thead>
</table>
| Project management | Champion adaptive management process. | Lead the project team with a clear adaptive management mindset. Build buy-in for adaptive management at all levels. | Key responsibilities:  
- Manages a team of flexible and adaptive employees  
- Oversees evidence-based adjustments in programming to achieve greater impact  
- Acquires and uses knowledge to make decisions and adjustments in programming to achieve greater impact  
Desired qualifications:  
- Demonstrated flexibility, adaptability, and ability to perform and collaborate in changing project environments  
- Proven ability to lead teams to critically reflect on evidence for improved performance |
<p>| | | Introduce structured processes and mechanisms for Review, Reflect, Respond (RRR), such as gathering information, reviewing performance and practice, and making changes to project interventions. | |
| | | Identify, manage, initiate, and influence change, and manage and support others through change. | |
| | | Promote a culture of learning, curiosity, and adaptation by not being afraid to fail and learning from mistakes. Celebrate adaptive management successes as shared successes. | |
| | Facilitate adaptive management procedures throughout project management processes. | Based on the project staffing structure, designate an adaptive management coordinator and delegate key monitoring, analysis, and learning functions as described below. | |
| | | Ensure project reports include explanations of learning and adaptation. Where possible, include this information as its own report section. | |
| | | Liaise with grants and contracts staff to coordinate agreement/award modifications that enable adaptive programming. | |
| | | If not located at the main project office site, travel as necessary to provide additional support when projects are pivoting or responding to changing circumstances. | |
| | | Co-lead pause and reflect sessions, learning reviews, and work-planning activities. Ensure data use and adhere to planned actions. | |
| | Liaise with the funder (if relevant) on learning and reflection processes. | Build a strong relationship with the funder’s point of contact (if relevant) that is rooted in sharing learning and analysis. If appropriate, suggest project adaptations informally before formally communicating requests or decisions. | Invite the funder (if relevant) to events or reflection meetings, as appropriate. |</p>
<table>
<thead>
<tr>
<th>DEPARTMENT/TEAM</th>
<th>ROLE</th>
<th>RESPONSIBILITY</th>
<th>SUGGESTED JOB DESCRIPTION LANGUAGE</th>
</tr>
</thead>
</table>
| Grants and contracts management | Support projects to make programmatic shifts. | Facilitate and negotiate formal agreement/award modifications (if relevant) that enable projects to shift and respond to changing circumstances. Advise projects on requests for waivers and modifications and draft them accordingly. Participate in pause and reflect sessions, learning reviews, and work-planning activities. | Key responsibilities:  
- Establishes mechanisms for adaptation of grants based on data  
- Communicates with grantees and donors about changes and how to be prepared for them  
- Analyzes financial data with attention to the impact of adaptation on programming  
Desired qualifications:  
- Experience managing different types of grants, contracts, and other mechanisms that allow projects to change course seamlessly in response to new information |
|                      | Support adaptive management during various budgeting stages. | Liaise with finance and business development teams during budget realignment and cost extension processes to ensure that key adaptive management processes related to reflection, analysis, and decision-making are adequately budgeted. | Maintaining flexibility and an open mind in budget and pipeline management. |
| Finance              | Facilitate nimble responses to changing circumstances or new evidence. | Participate in reflection meetings, and contribute to discussions about possible responses. Maintain flexibility and an open mind in budget and pipeline management. | |
| Human resources      | Recruit staff with adaptive management skills. | Include standard language in job descriptions for all staff, particularly for key personnel. Include adaptive management questions in interview guides. | |
| Technical leads/teams | Lead evidence-based adaptation efforts. | Review all analysis through the lens of programmatic approaches and activities. Suggest changes to approaches or processes based on the findings. Help interpret monitoring, evaluation, and learning (MEL) data findings. Participate in pause and reflect sessions, learning reviews, and information-gathering activities, such as surveys and analyses. | Key responsibilities:  
- Helps develop the learning agenda during the project’s proposal stage/start-up phase  
- Helps carry out data analysis and interpretation for learning  
- Leads the organization in scaling up project-level learning for cross-sectoral and cross-project learning  
Desired qualifications:  
- Experience leading analytical processes  
- Strong ability to analyze data and make programmatic recommendations  
- Strong ability to analyze data across projects at the sectoral level |
<p>|                      | If not located at the main project office, support project teams remotely to manage adaptively. | Provide technical inputs into information-gathering activities, such as surveys, research exercises, and analyses. Work with other project teams to ensure these provide actionable outcomes for the project. When participating in work-planning exercises, push teams to think about small bets or experimental activities based on their learnings from the previous year. Encourage adaptations and innovative thinking that pulls in the data and evidence they have gathered. Help plan learning events. Where possible, participate in pause and reflect sessions or learning reviews, and work with teams to make programmatic shifts based on these discussions. | |
|                      | Provide technical inputs to M&amp;E plans and evaluations to foster adaptive management. | Support project teams to use monitoring data for project decision-making, for example by providing technical inputs on survey tool design or analyzing quantitative and qualitative data. Work with the MEL team to design learning and evaluation questions that examine the efficacy of adaptive management practices and how these impact project results. | |</p>
<table>
<thead>
<tr>
<th>DEPARTMENT/TEAM</th>
<th>ROLE</th>
<th>RESPONSIBILITY</th>
<th>SUGGESTED JOB DESCRIPTION LANGUAGE</th>
</tr>
</thead>
</table>
| Monitoring, evaluation and learning (MEL) | Coordinate the entire adaptive management process. | Chair reflection meetings. | Key responsibilities:  
- Leads data collection and analysis process  
- Ensures data analysis, use, and feedback to respondents and all project stakeholders  
- Co-facilitates learning and reflection sessions  
- Ensures plans for answering questions are included in the learning agenda  
- Conducts preliminary analysis and flags data for other teams’ attention  
- Monitors data use and adaptation based on data |  |
| | Lead learning and data analysis efforts. | Coordinate all performance and research data compilation and analysis, and share learnings with the project team. |  |
| | Lead research efforts in support of adaptive management. | Maintain databases with up-to-date performance data. |  |
| | | Routinely analyze and visualize performance data and share with relevant parties internally and externally. |  |
| | Analyze data in support of adaptive management. | Manage data collection for responses to research and learning questions in the M&E plan. Ensure that the project is fulfilling its learning agenda and answering its learning questions. |  |
| | | Analyze research/context data, and present findings in data review meetings. |  |
| | | Prepare research data and analysis. |  |
| | Analyze data in support of adaptive management. | Provide trends analyses with both primary and secondary data. |  |
| Business development | Build adaptive management into all new opportunities, even when it is not explicitly required. | Integrate adaptive management principles throughout the technical design. At a minimum, this should include regularized data review meetings, but should also include mechanisms or design features that allow for flexible responses to changing circumstances. | Key responsibilities:  
- Ensures that proposals adequately address plans for data use and adaptation based on evidence  
- Ensures that proposals include adequate resources for adaptive management  
- Ensures that adaptive management sections of proposals reflect each specific donor’s preferred processes |  |
| | | Build adaptive management into proposed M&E plans, including through learning agendas, questions, and reviews; pause and reflect sessions; and signal indicators. Be sure to use terminology and processes preferred by each specific donor (e.g., “Collaborating, Learning, and Adapting” for USAID). | Desired qualifications:  
- Experience with quantitative and qualitative data collection processes  
- Experience in leading learning processes  
- Strong ability to analyze data and make programmatic recommendations |  |
| | | Include an adaptive management approach in the management plan. Highlight adaptive management experience in key personnel resumes/CVs. |  |
| | | Ensure that adaptive management capabilities are included in all key personnel job descriptions and interview guides. |  |
| | Build mechanisms for adaptive management into budgets during the proposal, cost extension, and realignment stages. | Include funding mechanisms that help facilitate adaptive management, such as rapid response sub-grant pools, innovation grant pools, and technical assistance/consultant pools. |  |
| | | Ensure that key adaptive management processes related to reflection, analysis, and decision-making are adequately budgeted. Ensure that mechanisms for supporting flexibility are reflected in the budget. | Desired qualifications:  
- Experience with designing and resourcing successful adaptive management and learning systems for successful proposals |  |
| | | Work with proposal managers and/or project teams to ensure that the budget narrative describes the mechanisms or budget lines in adaptive management terms. |  |
For a helpful and detailed guidance on how to hire adaptive staff for a variety of positions, check out USAID's Guide to Hiring Adaptive Employees, which provides information on:

- Competencies to recruit for in order to hire more adaptive employees
- Desired qualifications to incorporate into position descriptions to attract adaptive employees, such as:
  - Focuses on results and impact
  - Facilitates learning and builds relationships
  - Continuously learns and improves
  - Navigates change
- Interview questions to ask to screen for adaptive employee competencies, such as:
  - Can you tell me about your most recent failure or mistake? What did you learn from the experience? How have you applied what you learned since then?
  - Tell me about a time when you were required to change an approach or plan on-the-fly (i.e., in the moment with very little warning). What happened and what did you do?

Scenario Planning Decision Matrix and Template

Scenario planning comes in many forms. One way is to clearly identify the necessary conditions for a project to be implemented and ultimately to be successful. Teams identify which of these conditions will have a large effect on the project if they do not hold true (condition impact) and the likelihood of them not holding true (condition risk).

To engage in scenario planning, follow this three-step process.

1. List the conditions that are important to a project’s implementation or overall success.
2. Determine how important each condition is, using the decision matrix, below. The matrix assesses the risk of an expected condition holding compared to the degree of impact on the project if the condition does not hold. It suggests four options: stop the project, add resources or strategies, create a contingency plan, or do nothing.
3. Using the template on the next page, determine your scenario plan. Include the necessary conditions and decision matrix determination. An example is provided for guidance.

Risk Versus Impact Decision Matrix

<table>
<thead>
<tr>
<th>RISK OF THE CONDITION NOT HOLDING</th>
<th>IMPACT ON THE PROGRAM PLAN IF THE CONDITION DOES NOT HOLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very likely</td>
<td>Add resources and strategies or stop the project.</td>
</tr>
<tr>
<td>Likely</td>
<td>Create contingency plan.</td>
</tr>
<tr>
<td>Unlikely</td>
<td>Create a contingency plan.</td>
</tr>
<tr>
<td>Very unlikely</td>
<td>Do nothing.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Large impact</th>
<th>Moderate impact</th>
<th>Limited impact</th>
<th>Minor impact</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Add resources and strategies or stop the project.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create contingency plan.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create a contingency plan.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Do nothing.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Scenario Planning Template

<table>
<thead>
<tr>
<th>Necessary condition</th>
<th>Risk of the condition not holding</th>
<th>Impact on the project if the condition does not hold</th>
<th>Action according to the decision matrix</th>
<th>Justification for stop/do nothing, or description of new strategy or contingency plan</th>
<th>Resource considerations (financial, human)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Example:</strong> Political party election monitoring regulations finalized and approved at least 3 months before election day.</td>
<td>□ Very likely □ Likely ✔ Unlikely □ Very unlikely</td>
<td>✔ Large □ Moderate □ Limited □ Minor</td>
<td>□ Add resources and strategies □ Create a contingency plan (alternative activity) □ Stop the project □ Do nothing</td>
<td><strong>Example:</strong> In the unlikely event the regulations are not passed 3 months before the election, it will be almost impossible to design and print a handbook; design, organize, and deliver a cascaded training to all political party representative trainers; and ensure that those trainers can train all election observers in time to deploy on election day. If the regulations are not passed in time, the project should expect to ADJUST this activity by delivering the training directly to party monitors (rather than through a cascaded training), potentially with large-scale joint party trainings at the provincial level with simple handouts, and to focus more time working with party leadership to develop a system to compile and aggregate complaints for submission to the Electoral Commission.</td>
<td><strong>Example:</strong> This change should fit within allocated budget. Staff must be prepared to organize and deliver trainings themselves. In addition, staff must be prepared to work directly with party leaders.</td>
</tr>
<tr>
<td>□ Very likely □ Likely □ Unlikely □ Very unlikely</td>
<td>□ Large □ Moderate □ Limited □ Minor</td>
<td>□ Add resources and strategies □ Create a contingency plan (alternative activity) □ Stop the project □ Do nothing</td>
<td><strong>Example:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Very likely □ Likely □ Unlikely □ Very unlikely</td>
<td>□ Large □ Moderate □ Limited □ Minor</td>
<td>□ Add resources and strategies □ Create a contingency plan (alternative activity) □ Stop the project □ Do nothing</td>
<td><strong>Example:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Very likely □ Likely □ Unlikely □ Very unlikely</td>
<td>□ Large □ Moderate □ Limited □ Minor</td>
<td>□ Add resources and strategies □ Create a contingency plan (alternative activity) □ Stop the project □ Do nothing</td>
<td><strong>Example:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Very likely □ Likely □ Unlikely □ Very unlikely</td>
<td>□ Large □ Moderate □ Limited □ Minor</td>
<td>□ Add resources and strategies □ Create a contingency plan (alternative activity) □ Stop the project □ Do nothing</td>
<td><strong>Example:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Necessary condition</td>
<td>Risk of the condition not holding</td>
<td>Impact on the project if the condition does not hold</td>
<td>Action according to the decision matrix</td>
<td>Justification for stop/do nothing, or description of new strategy or contingency plan</td>
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</tr>
<tr>
<td>---------------------</td>
<td>----------------------------------</td>
<td>-----------------------------------------------------</td>
<td>---------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Very likely</td>
<td>Large</td>
<td>Add resources and strategies</td>
<td>Add resources and strategies Create a contingency plan (alternative activity) Stop the project Do nothing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Likely</td>
<td>Large</td>
<td>Add resources and strategies</td>
<td>Add resources and strategies Create a contingency plan (alternative activity) Stop the project Do nothing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Unlikely</td>
<td>Large</td>
<td>Add resources and strategies</td>
<td>Add resources and strategies Create a contingency plan (alternative activity) Stop the project Do nothing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Very unlikely</td>
<td>Large</td>
<td>Add resources and strategies</td>
<td>Add resources and strategies Create a contingency plan (alternative activity) Stop the project Do nothing</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Moderate</td>
<td>Add resources and strategies</td>
<td>Add resources and strategies Create a contingency plan (alternative activity) Stop the project Do nothing</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Limited</td>
<td>Add resources and strategies</td>
<td>Add resources and strategies Create a contingency plan (alternative activity) Stop the project Do nothing</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Minor</td>
<td>Add resources and strategies</td>
<td>Add resources and strategies Create a contingency plan (alternative activity) Stop the project Do nothing</td>
<td></td>
</tr>
</tbody>
</table>


Context Indicator Guide

An *indicator* specifies what kind of information you need to collect to understand whether you are on track to achieving your project goals. Indicators are part of a monitoring and evaluation (M&E) plan and are important for adaptive management and learning.

There are many types of indicators, but they can be organized into four main categories: *context, input, process, and results*. *Input, process, and results* indicators are generally well understood in projects: they track project activities and benefits.

The role of *context indicators* is less well understood. They provide information on the operating environment to enable projects to adapt as necessary as the environment changes and opportunities or challenges emerge. Because adaptive management depends on a solid understanding of the context and recognizing that the context can change, context indicators are critical to a sound adaptive management system.

Context indicators are tracked not only by M&E staff; technical staff, administrative staff, and partners all can assist in monitoring contextual changes. Context data may be gathered from both formal sources and informal sources. Some context data may come from larger analytic approaches, such as political economy analysis, or existing secondary data.

A project will have a particular composition of context indicators, depending on the type of adaptive management that is needed with the project’s degree of complexity. For example, a project that is more experimental or highly sensitive to shifts in the operating environment may require more context indicators, whereas projects that are highly evidenced or less sensitive to contextual shifts may require only one.

Context indicators generally come in the form of *sentinel, trigger, or trip-wire* indicators.

<table>
<thead>
<tr>
<th>CONTEXT INDICATOR TYPE</th>
<th>WHAT IT MEASURES</th>
<th>EXAMPLE</th>
<th>SAMPLE INDICATORS</th>
<th>DATA SOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sentinel indicator</td>
<td>Aspects of the context that are expected to affect the project, though it may be unclear in what way</td>
<td>For a project that is concerned that citizen unrest may break out into national-level demonstrations, but that does not know how that will affect the project (only that it likely will), a sentinel indicator could measure changes in citizen unrest to inform its adaptive management decisions. As citizen unrest increases or changes in nature, the project will need to decide how to adapt.</td>
<td>Number of protests occurring in the previous week</td>
<td>Media reports, civil society reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of people attending protests in the past week (estimate)</td>
<td>Media reports, civil society reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Percentage of citizens reporting dissatisfaction with the current government</td>
<td>National poll, comparison to previous percentages of dissatisfaction</td>
</tr>
</tbody>
</table>
### Context Indicator Types

<table>
<thead>
<tr>
<th>Context Indicator Type</th>
<th>What It Measures</th>
<th>Example</th>
<th>Sample Indicators</th>
<th>Data Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trip-wire indicator</strong></td>
<td>Aspects of the context that help determine whether the next phase of the project may proceed</td>
<td>For a project that is concerned that a gender equity law must be in place before an aspect of the project may proceed, a trip-wire indicator could monitor whether the proposed law is passed in parliament before proceeding with gender equity trainings for government agencies. Once the law is passed, the training program process can begin.</td>
<td>Stage of progress toward passing gender equality law (drafting, review, voting)</td>
<td>Parliamentary meeting minutes, political economy analysis key informant interview</td>
</tr>
<tr>
<td><strong>Trigger indicator</strong></td>
<td>Aspects of the context that help determine whether a specific, immediate action must take place to put a project back on track</td>
<td>For a project that is concerned that a possible call for early elections may derail parliament’s focus on drafting a law that enables private sector actors to import medication, a trigger indicator could monitor political party negotiations regarding elections. It would specify an alternative scenario to directly importing medication should an election be called early.</td>
<td>Number of meetings held on draft law on importing medication</td>
<td>Parliamentary meeting minutes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of key actors signaling likelihood of calling early elections</td>
<td>Political economy analysis key informant interviews, media reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Election Commission messaging and preparation signaling that early elections likely to be called</td>
<td>Election Commission activity monitoring</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of formal parliamentary sessions being cancelled (indicates political party distraction with election negotiations)</td>
<td>Parliamentary meeting minutes</td>
</tr>
</tbody>
</table>

Sometimes a project needs information on something that it cannot directly observe or measure. This often is true when using context indicators. In those cases, the project may need to measure something else that is correlated to what it is really interested in. For this reason, we also differentiate indicators by degree of “directness.” These types can be used to qualify any of the context indicator categories noted above.

<table>
<thead>
<tr>
<th>Indicator Type</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Direct indicator</strong></td>
<td>Can directly observe and measure</td>
<td>Degree of citizen unrest can be measured using public opinion polling or other forms of secondary data, such as media monitoring of violent outbreaks.</td>
</tr>
<tr>
<td><strong>Proxy indicator</strong></td>
<td>Measures something else as a stand-in for something that is not directly observable or measurable and is usually correlated or similar enough</td>
<td>If a project focuses on improving health outcomes, it is important to know whether a community suffers from food insecurity because good nutrition is critical to preventing and recovering from illness and disease. As a result, food security could be a context indicator. However, often it is not possible to directly measure food security because it is expensive to regularly survey homes to assess access to food. Instead, a proxy for food security could be sudden environmental changes that impact access to food, such as drought or flood. The proxy context indicator would measure such changes in order to alert the project that the larger context in which the health project operates might affect results.</td>
</tr>
<tr>
<td><strong>Leading indicator</strong></td>
<td>Provides information on a trend that will happen but has not yet been generalized to the population Akin to a proxy indicator, but more specifically serves the role of herald or harbinger</td>
<td>If a project wants to know whether elections may be called early because this would impact deliberations on a proposed health bill, the project may not want to wait until an election is called. Instead, it could monitor the extent to which formal parliamentary sessions are cancelled as a leading indicator of political party distraction with election negotiations.</td>
</tr>
</tbody>
</table>
Learning and Reflection Meeting Agenda Template

The following includes text that can be adopted directly for a learning and reflection meeting agenda, with the portions in yellow highlight denoting the text that needs customizing. Italicized text contains notes for the meeting organizers and facilitators and should not be shared with participants.

**Project Name**
Quarterly/Yearly/Midterm Learning Review Event

**Dates**

**Purpose:** To conduct a learning review that analyzes Project X performance data, provides insights, and identifies project progress toward targets and areas for adjustment

**Objectives:**
- To celebrate our accomplishments and hold ourselves accountable for quality and adherence to sectoral and general standards and best practices
- To analyze and reflect on evidence to discern the best way forward for Project X
- To commit to adaptive management and user-centric solutions in the best interest of the people we serve

**Results:**
- Main lessons drawn from Project X effectiveness (i.e. outcomes) over the past Time Frame (Quarter/Year/2.5 Years)
- Common understanding on what worked, how, and why and what Project X’s lessons are for future programming
- Recalibrated focus and approaches until the next reflection period

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Details</th>
<th>Session Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30–9:00</td>
<td>Check-in and tea/coffee/snacks</td>
<td></td>
</tr>
<tr>
<td>9:00–9:15</td>
<td><strong>Objectives, Activities, Results, Rules</strong></td>
<td>Understanding the what, why, and how of the next two days</td>
</tr>
<tr>
<td>9:15–9:30</td>
<td><strong>Warm-Up Activity</strong></td>
<td>Event participants are ready to be open to learning and to respect diverse viewpoints</td>
</tr>
<tr>
<td>9:30–10:45</td>
<td><strong>Presentation of Data and Discussion</strong>&lt;br&gt;<em>Presentation: Brief presentations of analysis key findings</em>&lt;br&gt;<em>Timing for each topic: From the total length of the session, subtract 5 minutes for introduction and 10 minutes for conclusion, then divide that number by the total number of topics. For example: 75 minutes – 5 introduction – 10 conclusion = 60 minutes. 60 minutes ÷ 5 main topics = 12 minutes per topic for presentation and discussion.</em>&lt;br&gt;<em>Discussion:</em>&lt;br&gt; - What data and information have we collected?&lt;br&gt;- What is not new? What are surprises?&lt;br&gt;- What does this data mean in the context of our project goal?</td>
<td>Review of analysis findings and discussion held on the key takeaways</td>
</tr>
<tr>
<td>10:45–11:00</td>
<td>Break</td>
<td></td>
</tr>
</tbody>
</table>

6 Ideally ahead of the event, the project and/or consultants prepare and share with participants the data either in slide deck format, short analytical meme, or whatever format works best. Analytical memos cover data answering the project learning questions along various themes, analysis of project results, and context/operating environment data.
## Session Details

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Details</th>
<th>Session Outcome</th>
</tr>
</thead>
</table>
- What do our analyses tell us?  
- What lessons do we draw from those? | An initial list of the main actionable takeaways                                    |
| 12:00–13:00    | Lunch                                                                            |                                                                                  |
| 13:00–15:00    | **Small Group Work: Capturing Lessons Learned and Promising Practices** Each small group is assigned one analytical memo/topic to review. Small groups discuss how they will creatively present the lessons learned and promising practices on Day 2. | Groups are prepared to give presentations with their interpretation of the lessons learned and promising practices These presentations can consist of creative formats, like dramatic or comedic acts, poems, or gameshows, or simply can be a standard slide deck or oral summary presentation. |
| 15:00–15:15    | Break/working break                                                              |                                                                                  |
| 15:15–16:30    | Continued small group work preparations                                          | Presentation ready to give on Day 2                                               |
| 16:30–17:00    | **Wrap-Up**  
*Use a facilitation activity (like one found at [http://www.liberatingstructures.com/ls-menu](http://www.liberatingstructures.com/ls-menu)) to elicit main achievements of the day.* | A summary of the day, plan for tomorrow, and topics needed to cover tomorrow       |

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Details</th>
<th>Session Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30–9:00</td>
<td>Tea/coffee/snacks</td>
<td></td>
</tr>
</tbody>
</table>
| 9:00–9:30      | **Introduction**  
- Brief recap of past day  
- What participants can expect in the day ahead | Participants on the same page and ready for the day                                |
| 9:30–11:00     | **Group Presentations on Lessons Learned and Promising Practices** Learnings from analytical memos presented in a creative format |                                                                                  |
| 11:00–11:15    | Break                                                                            |                                                                                  |
| 11:15–13:00    | **Group Performances/Presentations on Lessons Learned and Promising Practices** (continued) Learnings from analytical memos presented in a creative format |                                                                                  |
| 13:00–14:00    | Lunch                                                                            |                                                                                  |
| 14:00–15:30    | **World Café Stations Led by PROJECT X Partners: Towards Sustainability and Actionable Recommendations**  
This session consists of partner- or stakeholder-led feedback sessions that include discussions with insights from presentations/performances. World Café is only one type of approach you could use. | Summary by topic/theme on what has been working, what has not been working, and why/how |
| 15:30–15:45    | Break                                                                            |                                                                                  |
| 15:45–16:30    | **Plenary Facilitated Discussion**  
Readout from World Café Stations Compile final collection of reflections and project’s strengths and opportunities |                                                                                  |
| 16:30–17:00    | Recap of Event  
Next Steps  
Closure Communicate summary of event and next steps Thank attendees for their participation |                                                                                  |

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**Reflection Meeting Slide Deck Outline**

This tool provides the suggested content to cover in a slide deck for a learning and reflection meeting. This slide deck outline is a starting point for a quarterly reflection meeting and may be adapted as necessary to fit the project’s needs and based on the frequency of the meeting, as follows:

- **Simple project** = conduct annually or more frequently
- **Complicated project** = conduct semi-annually or more frequently
- **Complex project** = conduct quarterly or more frequently

Time to spend on each section will be dependent on the total time you have for the meeting.

Below is a section-by-section list of what to include in the slide deck.

**Title slide**

- Name of Meeting (Such as “Adaptive Management Reflection Meeting”)
- Project name
- Date

**Meeting Agenda**

Present the proposed meeting agenda. Ask if staff have anything to add. List and agree on ground rules for the discussion.

This meeting agenda is only a sample. If relevant, organize the programming/results updates by project objective.

1. Review and agree on objectives of meeting
2. Review past quarterly meeting and status updates on action items
3. Revisit theory of change/programming approaches/strategy
4. Present context data for past quarter
5. Programming/results updates
   a. Results against targets for past quarter (indicator data)
   b. Other performance data (Outcome Mapping, evaluation, assessments, other)
6. Finance/grants/administrative issues
7. Discuss changes needed based on results and context data, with read-outs (small group activity)
8. Action planning

**Objectives of the Meeting**

1. Review latest performance, context, and finance data
2. Discuss learning implications on programming
3. Conduct action planning for adaptation

To prepare for each meeting:

- Review previous meeting’s action items.
- Provide progress update on implementation of those action items.
- Analyze the most up-to-date output data and outcome indicator data if you have it. Decide which data points are the most critical/useful to review.
- Analyze other complementary data, such as Outcome Mapping or Outcome Harvesting.
- Pull relevant findings from external studies.
- Pull main findings from ongoing political economy or contextual analyses.

See also TOOL 7: How to Prepare for Learning Review Meetings for additional guidance.
Review of Past Action Plans and Progress Updates

Summarize the main points discussed and conclusions drawn. Show a table of action items from a previous meeting and discuss progress on those action items and anything that still needs to be addressed. The following is a sample table that can be used to facilitate the discussion of the previous action planning and updates.

<table>
<thead>
<tr>
<th>Action item</th>
<th>Responsible party</th>
<th>Due date</th>
<th>Latest update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finalize call for proposals for small grants</td>
<td>Program Officer</td>
<td>1-Feb-20</td>
<td>Still in progress, to be completed by May 2020</td>
</tr>
</tbody>
</table>

Review of Project Theories, Results Framework, and Alterations to Date

To help frame the later review of results to date:
- Present the theory of change, theory of action, theory of context, and/or project results framework. Use text and/or graphics.
- List the main programming approaches/strategies. Explain which have been altered so far and why. You may include the table from Decision Tracker document.

Contextual Updates

List the context indicators and share the gathered context data. Address the latest information about your operating environment and provide key updates from the last quarter that have programming implications.

Then, list key findings from the latest context data. Sources could include:
- Applied Political Economy Analysis (APEA) or situation analysis
- Quarterly environmental/contextual scans
- Relevant external studies
- Media accounts
- Partner reports

Latest Project Performance

Share the top 5–10 outputs or performance outcomes since the last meeting. Only include output data here if it specifies that the project is under- or over-performing against targets, is linked to new activities, or illustrates a strategic output that is a proxy for overall performance.

Include sentinel or proxy indicators as appropriate to place project results in context.

If relevant, organize slides by project objective. Visualize the data in charts/graphs, and present actuals against targets, as the example slide below illustrates.
In other slides in this section, present other performance data here, such as:

- Outcome Mapping journals
- Other assessment data
- Evaluation findings

At right is an illustration of a slide summarizing Outcome Mapping data and subsequent conclusions.

**Update on Finance/Grants/Administrative Data**

Present on any finance, administrative, or grant issues, such as:

- Pipelines and cash flow (burn rates)
- Grant award issues
- Results-based financing (results targets against budget spending)

**Reflection Activity**

You may divide into groups based on objective, theme, theory of change element, or some other relevant factor. You could spend half the time on group work and half the time on short read-outs. Below is a sample activity and prompting questions.

**ACTIVITY**

**Reflection on relevance of approaches and changes needed**

1. What additional data do we need in order to make judgements on potential changes needed?
2. Based on the information presented, what tactical or strategic project adaptations would you recommend? Why?
3. Reflecting on the Theory of Action, Theory of Change, and Theory of Context, have any of these changed or has our understanding of any of these changed?

**Action Planning**

The following are sample guiding questions to facilitate an action planning session:

- What do these data mean for programming in the next quarter?
- Do any plans (strategies, approaches, tactics) need to change?

For meeting minutes/next steps, complete the simple Action Planning Table, below. The sample table below can be used to facilitate the discussion. After the event, any major decisions should be logged into **Tool 8: Decision Tracker**.

**Action Planning Table**

<table>
<thead>
<tr>
<th>Action item</th>
<th>Responsible party</th>
<th>Due date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host co-creation workshop with grant program applicants</td>
<td>Program Officer</td>
<td>15 March 2020</td>
</tr>
</tbody>
</table>


**TOOL 7**

**How to Prepare for Learning Review Meetings**

Below is an illustrative breakdown of what to review at various project learning review points: bi-weekly, quarterly, annually, midterm, and endline. Projects should use this as an example and customize it to their needs. Senior project management staff (e.g., project director, deputy chief of party) should determine which staff will be responsible for preparing the required data.

For each meeting, the team should:

- Review the previous meeting’s action items
- Provide progress updates on implementation of those action items
- Analyze the most up-to-date indicator data, if available, and decide which data points are the most critical/useful to review
- Analyze other complementary data, such as qualitative information gathered from Outcome Mapping, Outcome Harvesting, or a similar information-gathering approach
- Pull relevant findings from external studies (e.g., academic studies, reports by international organizations or governments, media reports) and ongoing contextual analyses
- Present the data in a concise format. For routine meetings, this can be as informal as bullet points; for annual or midterm learning review, more formalized analytical products can be produced, such as brief analytical memos divided by key learning question or theme or slide decks.

<table>
<thead>
<tr>
<th>MEETING FREQUENCY</th>
<th>WHO ATTENDS</th>
<th>PURPOSE OF MEETING/QUESTIONS TO ASK DURING THE MEETING</th>
<th>MEETING RESULT</th>
</tr>
</thead>
</table>
| Bi-weekly         | Project staff | **Results:** What are the top 3 outputs (critical indicators) for the past 2 weeks? Visualize these in a chart/graph with actuals against targets.  
**Context:** What is the latest contextual information about our operating environment?  
**Learning:**  
- What does the achievement against targets tell us about our implementation (the why)?  
- What does the latest context information mean for our project?  
**Action planning (use table in TOOL 6 as guidance):**  
- What are the implications of these outputs and context data for the next 2 weeks, if any?  
- Do any project plans need to change? | Action planning table (TOOL 6) |
| Quarterly         | Project staff | **Results:** What are the top 5–10 outputs or performance outcomes for the past 3 months? Visualize these in a chart/graph with actuals against targets. Only include output data here if it is under- or over-performing against targets, linked to new activities, or a strategic output that is a proxy for overall performance. Include sentinel indicators here, if applicable.  
**Context:** What is the latest contextual information about our operating environment?  
Also include context indicators here.  
**Learning:**  
- What does the achievement against targets tell us about our implementation (the why)?  
- What does the latest context information mean for our project?  
**Action planning (use table in TOOL 6 as guidance):**  
- What are the implications of these outputs and context data for the next quarter, if any?  
- Do any project plans or approaches need to change? | Action planning table (TOOL 6)  
Learning and adaptation write-up for the quarterly report with recommendations for the next project quarter |
<table>
<thead>
<tr>
<th>MEETING FREQUENCY</th>
<th>WHO ATTENDS</th>
<th>PURPOSE OF MEETING/QUESTIONS TO ASK DURING THE MEETING</th>
<th>MEETING RESULT</th>
</tr>
</thead>
</table>
| Annually          | All project staff, funder, key partners | **Results**: What are the top 5–10 performance outcomes for the past year? Visualize these in a chart/graph with actuals against targets.  
**Context**: What is the latest contextual information about our operating environment?  
**Learning**:  
• What does the achievement against targets tell us about our implementation (the why)?  
• What does the latest context information mean for our project?  
**Action planning** *(use table in TOOL 6 as guidance)*:  
• What are the implications of these outputs and context data for the next year, if any?  
• Is our theory of change holding true?  
• Do any project plans, strategies, or approaches need to change? | Action planning table *(TOOL 6)*  
Learning and adaptation write-up for the annual report with recommendations for the next project year |
| Midterm           | All project staff, funder, key partners | **Results**: What are the top 10 performance outcomes for the first half of the project? Visualize these in a chart/graph with actuals against targets. Include other evaluation data like Outcome Mapping or Outcome Harvesting.  
**Context**: What is the latest contextual information about our operating environment?  
**Learning**:  
• What information have we gathered to answer the learning questions from our project learning agenda?  
• What are the implications of the answers to our learning agenda questions for our programming approaches?  
• What does the achievement against targets tell us about our implementation (the why)?  
• How aligned is our performance with our objectives? Are we on track to achieve the objectives? Why/why not?  
• Reflecting on our performance and research data, to what extent are we aligned with our theory of change?  
**Action planning** *(use table in TOOL 6 as guidance)*:  
• What are the implications of these outcomes for the next half of the project, if any?  
• Do any project plans, approaches, or theories of change need to change? | Action planning table *(TOOL 6)*  
Learning and adaptation write-up for the midterm report (or quarterly/annual report, if no midterm report is required) with recommendations for the project’s second half |
| Endline           | All project staff, funder, key partners | **Results**: What are the top 10 performance outcomes for the entire life of the project? Visualize these in a chart/graph with actuals against targets. Include other evaluation data, like that collected from Outcome Mapping or Outcome Harvesting.  
**Context**: What is the latest contextual information about our operating environment?  
**Learning**:  
• What information have we gathered to answer the learning questions from our project learning agenda?  
• What implications do these answers have for future programming approaches?  
• Reflecting on our performance, research, and context data, to what extent did we align with our theory of change?  
• How aligned was our performance with our project objectives/goal?  
**Action planning** *(use table in TOOL 6 as guidance)*:  
• What are the implications of these outcomes for the next project?  
• Do any project approaches, strategies, or theories of change need to change for future projects? | Action planning table *(TOOL 6)*  
Learning and adaptation write-up for final report with recommendations for future programming |
**Tool 8**

**Decision Tracker for Adaptive Management**

This decision tracker table should be used to list decisions and adaptations made using evidence. Periodic analysis of the table will allow the project to understand and demonstrate how well it is learning and adapting, with the ultimate goal of improving how the project carries out development by adapting to changing needs and contexts.

Data from this tracker can be used to improve project learning and adaptation practices and to communicate how the project is learning and adapting. This should be shared with project participants, beneficiaries, stakeholders, and funders.

This tracker should be completed at whatever frequency makes the most sense for projects. It may be easiest and best to add decisions to the tracker table as they are made, but analysis could be done less frequently (such as semi-annually or annually).

Analysis could include statements such as “as a result of X learning event or Y analytical process, we chose to do Z. As a result, we saw improvements in progress toward achieving Objective 1.”

**Include in the tracker:**

- **Strategic decisions:** Fundamental changes, such as to programmatic approach, LogFrame, theory of change, or theory of action (operational model). This is the “why” of the project. For example, the project decides to stop working with youth-focused civil society organizations because they are not the right target group to help reach project results.

- **Tactical decisions:** Changes to the “how you do it.” These are narrow yet meaningful actions/interventions while you are still operating within the project theory of change. Examples include changing the work plan, using different methods of reaching citizens, convening organizations working on similar advocacy issues to better collaborate and coordinate their activities, changing the time of meetings for better participation, and moving from contracts to grants.

**Routine project management decisions do not need to be included in this tracker:** These include deciding to sub-contract to a particular civil society organization that was part of your workplan or making personnel changes.

You may use the following guiding questions when analyzing decisions included in the tracker table.
Quantity and Type of Adaptations

- In the previous review period, has the project made any tactical or strategic changes as a result of learning and reflection processes? If so, how many?
  Number of tactical changes: __
  Number of strategic changes: __

Please list any notable examples of changes that were made (no more than 3).

- If any part of the project was altered, was there a cost to adaptation (i.e., by investing in one approach and pivoting away from something else)?
  Example: Our data monitoring and analysis led us to drop interventions that were not as impactful as expected, such as election monitoring exchanges.

- If any part of project was altered, was anything gained, such as unexpected or unintended improvements?
  Example: We found the regional electoral authorities to be more interested in partnering with the project than the central election commission, so we added more activities with regional commissions in the hopes of having more impact by capitalizing on that political will and motivation.

Results of decision/change

When enough time has passed, look retrospectively at a decision to evaluate any changes.

- What happened as a result of making this decision?
- What are the early or medium-term indications of the effects this decision will have on the project outcomes? (If decision is related to project indicators, please list relevant project indicators and progress against targets before and after the decision.)
  Example: Early changes seen: Regional election monitor officials welcomed the training and improved scores on pre-and post-training surveys.

  Medium-term changes seen: Regional election monitors have started conducting trainings themselves, and their trainees have shown high scores on pre- and post-training surveys.

  Indicator related to this change: Percentage of officials equipped to monitor elections in line with best practices and the laws of the country
  • Actual before decision made: 45%
  • Actual one year after decision made: 85%
  • Life of project target: 80%, achieved by FY19
### Adaptation Decision Tracker Table

<table>
<thead>
<tr>
<th>Decision date</th>
<th>Date of next review</th>
<th>Data cited for decision: Describe data point(s) and source(s) that influenced this decision.</th>
<th>a. Project decision: What project decisions resulted from the learnings?</th>
<th>b. Type of decision: Strategic or tactical?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: March 2021</td>
<td>Sep-21</td>
<td><strong>Example:</strong> Key informant interviews completed in December 2020 with election monitors. Analysis of pre- and post-training surveys indicated knowledge and skill levels for effective election monitors remained low and were insufficient for them to become trainers themselves.</td>
<td></td>
<td><strong>Example:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>a. Added more cascaded training sessions for election monitors to improve knowledge uptake and application</td>
<td>b. Tactical decision</td>
</tr>
</tbody>
</table>