



# MEL and adaptive programming: Experience from two multi-year programmes in international development

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## Abstract

Learning and adaptation within programmes remain important issues in international development programming. Hence, monitoring, evaluation, and learning (MEL) activities must be designed and implemented in a way that supports such learning and adaptation. This article looks at two adaptive programmes as case studies – MUVA in Mozambique and Building Resilience in Ethiopia (BRE-TA), one or both of which the authors have been involved in. The article aims to identify the features in their MEL processes that enable successful learning and adaptation.

We argue that the following key features of our conceptualisation and practical experience can be of relevance for other programmes. First, we recommend investing in participatory processes for designing theories of change (ToCs) that include implementing organisations or individuals and that build on their intrinsic motivations. This helps to increase ownership of the programme objectives and alignment of implementers' incentives. Second, we argue that synchronising data collection and analysis explicitly with a learning and adaptation cycle is crucial. Third, we also recommend intentionally involving individuals who implement activities in the learning and adaptation process. This helps to increase the viability of proposed adaptations. Fourth, we recommend placing the MEL process within an institutional structure that allows for accountability, including being able to trace how evidence feeds into decision-making and leads to adaptation.

We have found that these features help place MEL closer to the centre of programmes, and support adaptation. They also work towards improving design and implementation, thereby increasing the chances of achieving impact.

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## List of abbreviations

BRE-TA	Building Resilience in Ethiopia – Technical Assistance
FCDO	UK Foreign, Commonwealth and Development Office
MEL	Monitoring, evaluation, and learning
NGO	Non-governmental organisation
OPM	Oxford Policy Management
ToC	Theory of change
USAID	United States Agency for International Development
VfM	Value for money

# 1 Introduction

## 1.1 Context

Across the international development field, learning and adaptation has become a key part of the discourse. There is extensive literature on adaptive management and the role of evidence in effective adaptation (Global Learning for Adaptive Management, 2020).

However, the breadth of the literature does not necessarily imply high levels of learning and adaptation in practice. There is plenty of discussion on the importance of learning and adaptation, but little on *how* to do it (Green, 2021a). In addition, ‘much development practice [...] discourages learning and adaptation. This is in part because projects are seen as “closed, controllable and unchanging systems” (Mosse, 1998: 5)’ (in Valters *et al.*, 2016: 5). An important point in the conversation among theorists and practitioners is understanding how we can create more adaptive systems that can be applied in international development.

While an increasing number of donors talk about the importance of being adaptive, implementers struggle with operationalising this agenda, particularly regarding the role of monitoring, evaluation, and learning (MEL) within adaptive processes (Dillon, 2019: 27; Prieto-Martin *et al.*, 2017: 10; Teskey and Tyrrel, 2021: 3). There are many challenges in doing this:

- To learn, one needs to be able to make and admit mistakes, which requires trust.
- While adapting and learning, clients<sup>1</sup> need reassurance that results will be produced and accounted for.
- Decision-making based on monitoring and evaluation activities requires rapid feedback loops, while still demanding rigorous data. The latter often take time to collect and analyse.

In order to successfully implement MEL in an adaptive programme these challenges need to be addressed.

Two examples of adaptive programmes that involve using MEL to address these challenges are the following: (1) MUVA in Mozambique; and (2) the Building Resilience in Ethiopia Technical Assistance (BRE-TA) programme. MUVA started in 2015 as a programme that identifies, tests, and supports the scale-up of innovative approaches to ensure better access to work for poor and vulnerable young women in urban Mozambique. While the programme ended in 2022 an MUVA NGO was set up that is continuing its activities. BRE-TA started in 2019 (and is scheduled to run until 2024) and supports the Government of Ethiopia with technical assistance to strengthen the response to humanitarian and climate shocks. Both programmes have actively worked to operationalise MEL within adaptive programming. As such, they provide an opportunity for sharing experiences and insights for other programmes that seek to implement similar adaptive processes.

This article identifies key features that help address the challenges of MEL in adaptive programming. Based on internal and external findings from the two case study programmes

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<sup>1</sup> In our context, ‘clients’ tends to refer to donors who want to see results from their investments.

and current literature, we draw some main lessons. These lessons may be useful for other programmes on how to operationalise MEL in adaptive programmes.

## 1.2 Methods and structure

This article started as a reflection on which elements of the MUVA MEL approach may be applicable to other programmes. These elements were then applied to the BRE-TA programme. The MEL staff on both programmes have received positive feedback from clients, implementing partners, and management staff. This feedback further encouraged the work on this article. To reduce author discretion, the article was enriched with evidence on the programmes from the Foreign, Commonwealth and Development Office (FCDO) annual reviews, independent value for money (VfM) assessments, discussions during reflection workshops, and internal MEL documents. In addition, a review of the literature has ensured that the article's arguments are well-founded in the existing literature.

While we recognise that insights deriving from the experiences of those who created the MEL systems for MUVA and BRE-TA will inevitably include a certain level of subjectivity, we believe that, with the mechanisms utilised to triangulate our experiences, the article provides a unique and contextualised view on MEL in adaptive programming. As highlighted by Teskey and Tyrrel (2021: 3), there is a need to increase the practical considerations in the debate on adaptive programming. This article aims to contribute to this discussion.

We are not the first to use MEL for effective adaptation, but we think that we can add valuable insights gained from our experience.

This article starts with a brief review of the current literature on MEL in adaptive programming. This is followed by an introduction on how to proceed in practice. The article then moves on to describe four key features of MUVA and BRE-TA that we believe are particularly relevant for other programmes. For each of these features, the article provides a short description of our experience in the two programmes, followed by relevant evidence, analysis, and conclusions.



## 2 Adaptive programming and MEL in theory

### 2.1 MEL and adaptive programmes in international development

For the purposes of this article we use the term *programme* to refer to a series of emerging interventions or projects that have a common objective and that are grouped under an overarching framework. These interventions (or projects) cover a wide range of different activities that contribute to the overall (programme) objective.<sup>2</sup>

The two case study programmes (MUVA and BRE-TA) discussed here are both contracted by a client, in this case a donor (the UK's FCDO),<sup>3</sup> to a contractor (Oxford Policy Management), a development consultancy. In both cases, Oxford Policy Management (OPM) works with local and international partners and staff who design and implement the programme and its interventions. These partners and staff are referred to as the *implementers* in this article. Programmes begin with a design phase. One part of this phase is the development of a theory of change (ToC). The ToC clarifies the objectives (the desired change) and the strategies for achieving this change. The design phase is followed by the implementation phase, during which reflections and course corrections (adaptations) can happen. There can be a tension between aiming to achieve pre-agreed targets and milestones and the need to adapt to changing circumstances and new insights.

While adaptive management of programmes is not a new phenomenon, it has gained increasing attention in recent years. In the debate about adaptive management, academics and practitioners alike criticise the prevailing approach to implementing international development programmes as linear, static, and simplified (Ramalingam, 2013: 353). Adaptive programming and management addresses this criticism by developing an approach that:

- focuses on linking adaptation and learning;
- reframes project design and implementation, including engaging in repeated experimentation and adjustments based on learning;
- manages programmes through flexible structures and processes; and
- integrates MEL (Brinkerhoff *et al.*, 2018: 2).

Dillion (2019: 4) argues that to successfully implement adaptive MEL in a programme, MEL needs to be a part of 'providing information that encourages continuous experimentation, testing and re-testing of approaches as programme activities are implemented and situations evolve'. The aspect of learning is obviously a main link between adaptive programming and MEL. While learning can take many different shapes, here we focus on individuals' experiences that collectively change the understanding of the programme or phenomena addressed. In this context, learning tends to focus on ways to improve design and

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<sup>2</sup> As both MUVA activities and the BRE-TA programme are still ongoing (in the case of MUVA, not as a programme but as an NGO), in this article we use the present tense for both MUVA and BRE-TA, for the sake of efficiency and ease of understanding.

<sup>3</sup> BRE-TA is also co-funded by the United States Agency for International Development (USAID).

implementation. This should not overlook the fact that learning also relates to the question of how to gather evidence to extrapolate beyond the specific initiative concerned.

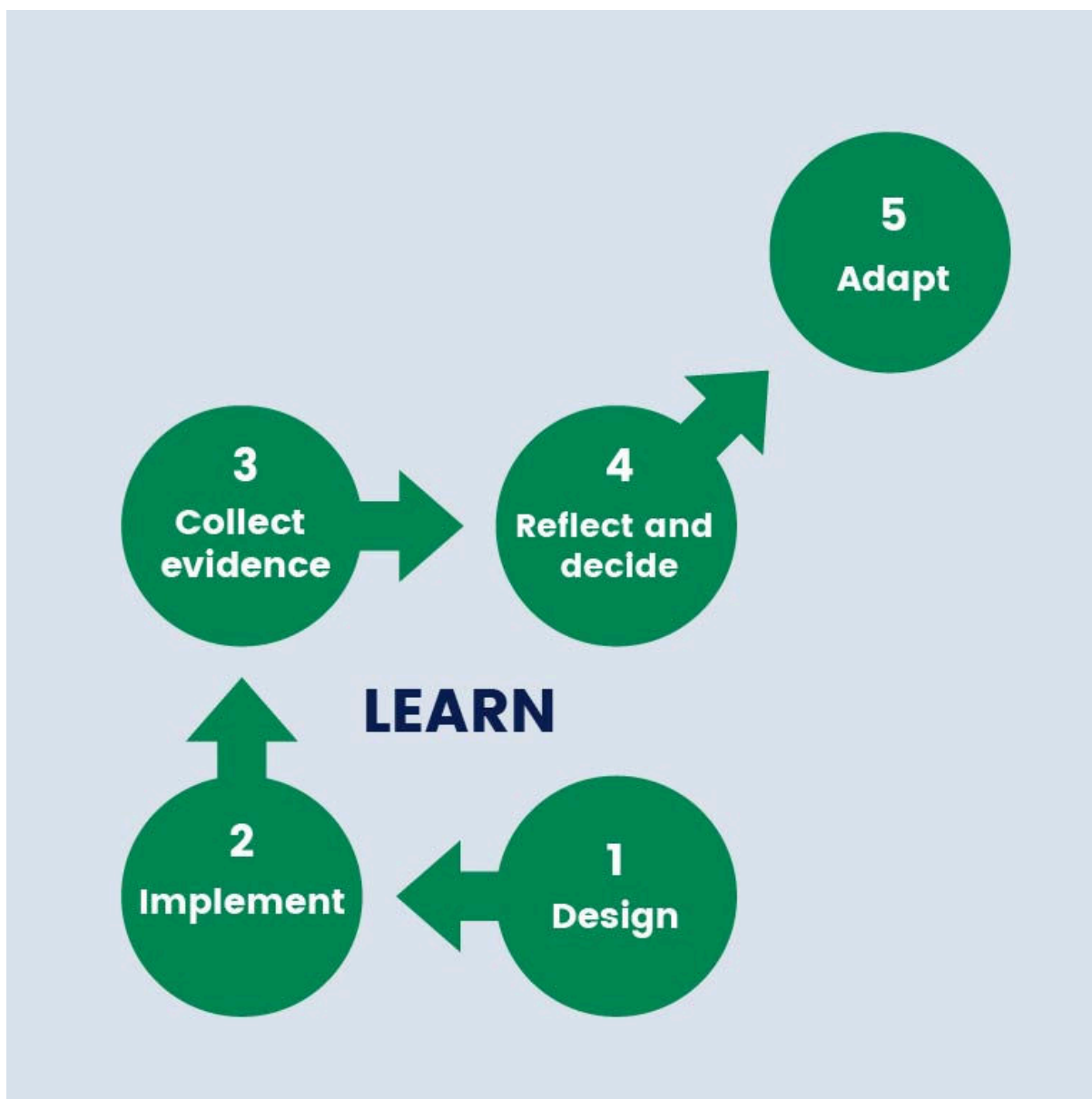
Despite the important role that the provision of information can play in the learning cycle and the process of adjusting strategies and improving operations, information is often collected mainly for accountability purposes. And ‘what is often called “accountability” between development partners tends to be more focused on “accountancy”, and leaves little room for learning. An underlying issue here is that contracts [...] and the logframes [...] embody the presumption that the need to change a programme reflects failure’ (Valters *et al.*, 2016: 19). The implicit risk is that the desire to reassure the client by providing the desired information can lead to low engagement with data, perverse incentives, or gaming. Gutheil finds that in partnerships between organisations from the Global North and the Global South, the Southern organisations are often excluded from the design phase (Gutheil, 2020: 136). As a result, ToCs, and subsequent MEL frameworks, are not grounded in local perceptions. This reinforces the view of MEL as external to those implementing the programme.

All programme stakeholders (i.e. those that have a stake in the success of the programme) need to be included in establishing the MEL system and the reception of the evidence, to enable the MEL to go beyond being an auditing function and to become a proper learning function.

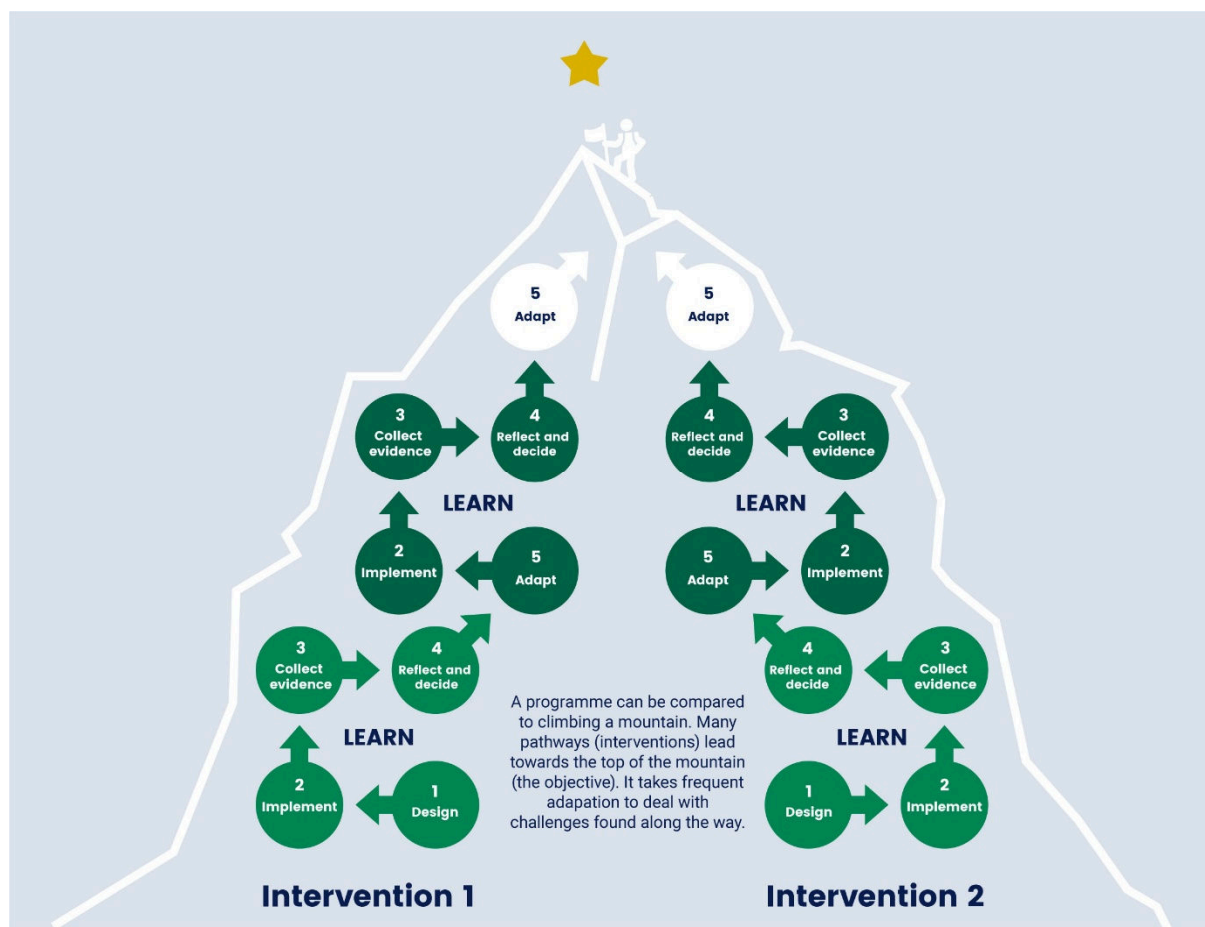
## **2.2 Operationalising MEL in adaptive programming**

As stated above, international development programmes have generally been governed as ‘linear programmes’, with ‘a life cycle, which typically evolves from the preparation phase to the implementation phase to the closure/evaluation phase’ (Ika *et al.*, 2020: 549). The adaptive management agenda aims to change this view of programmes, moving towards an approach to programmes that includes learning and experimentation. This approach tends to include learning that is characterised by using evidence to restructure the actions and goals of the programme. This is illustrated in Figure 1.

**Figure 1: Learning and adaptation steps**



After going through all five steps outlined in Figure 1, there are further rounds of implementation, data collection, and adaptation, until, ideally, the programme objectives are achieved (see Figure 2). This approach aims to ensure that learning and adaptation is at the heart of a programme. In addition, there are often several interventions operating in parallel towards a common goal (see also our understanding of the term 'programme', set out at the beginning of Section 2.1).

**Figure 2: Learning and adaptation iterations continue until objective is achieved**

In the literature, researchers have found that in some programmes MEL is present throughout the cycle, utilising different elements to support adaptive programmes (Ramalingam *et al.*, 2019: 9). Ramalingam *et al.* (2019: 10) outline a number of points that need to be considered in order to establish effective MEL processes:

- *Assess and design*: This involves considerations focusing on understanding the core problem, the programmatic context, and the design of appropriate portfolio interventions.
- *Implement*: This refers to MEL processes to ensure targeted collection of data and evidence on outputs and outcomes, to support ongoing operational decision-making and to enable assessment of the scope for novel or innovative approaches.
- *Adapt*: This refers to supporting timely and appropriate tactical and strategic changes.

The complex settings in which adaptive programmes operate need to be taken into account when deciding to apply an adaptive approach. It has been acknowledged that existing structures, such as inappropriate accountability systems, can create constraints on implementers' ability to be adaptive (Rogers and Macfarlan, 2020a: 3; Laws *et al.*, 2021: 1; Brinkerhoff *et al.*, 2018: 2; Prieto-Martin *et al.*, 2017: 32). These constraints also include contractual factors, and a lack of motivation and trust.

How to address these structures and constraints through MEL has been addressed in the literature (Brinkerhoff *et al.*, 2018; Gutheil, 2020; among others). Brinkerhoff *et al.* (2018: 6) emphasise the need to engage in periodic learning, and to integrate learning with implementation. Gutheil (2020:133) identifies the need to work in partnership, to have a

flexible ToC that incorporates local input, and to enable local organisations to create their own monitoring and evaluation framework. As stated earlier, there are calls for more practical guidance regarding how to operationalise approaches such as adaptive development initiatives (Teskey and Tyrrel, 2021:3).

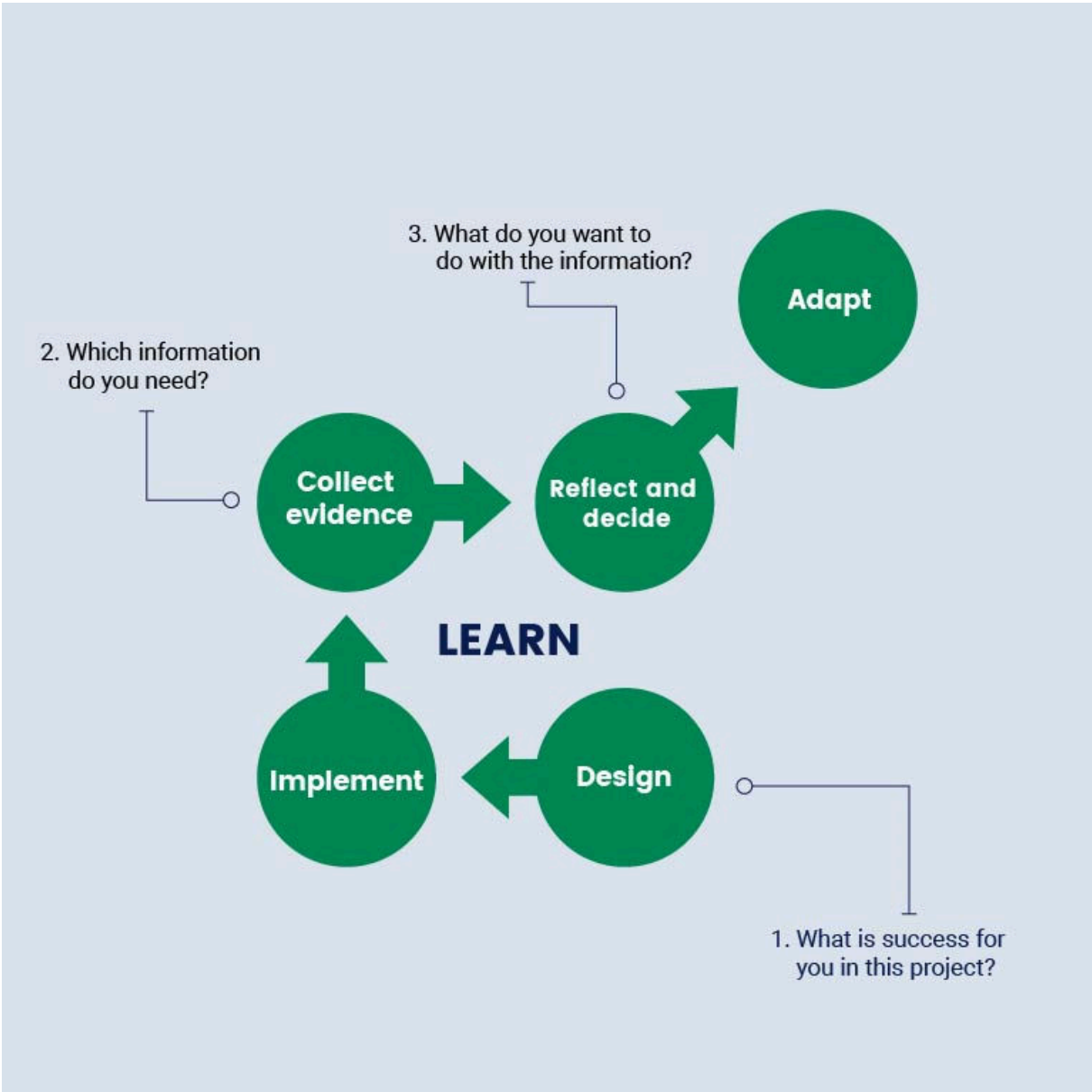
In sum, this review suggests that to be effective, MEL in adaptive programmes must become more inclusive, learning-based, and iterative. Given the call for more information on how this could be done in practice, we believe that further reflections on this would be beneficial.

### 3 Learning and adaptation cycle in practice

Applying these concepts in practice can take many forms. Given that there are calls for more practical guidance in this area, this section provides one example of how to operationalise approaches such as adaptive development. The example is based on experience gained from working on MUVA and BRE-TA, as well as other programmes.

The starting point is to ask stakeholders three simple questions, the answers to which will provide the foundation for the subsequent MEL work. These questions relate to different stages of the programme cycle, as shown in Figure 3.

**Figure 3: Three questions related to the project cycle**



1. The team responsible for MEL should start by asking the implementers (and at times the wider group of stakeholders) *‘For you, what does success with respect to the programme look like? Put differently: if you were to describe to a friend or relative what you are*

*hoping to achieve with the programme, what would you say?* These questions aim to uncover the motivations of the stakeholders and what is particularly relevant to them. These points can then be linked to the programme objectives.

Follow-on questions are *'What are the challenges?'* and *'How do we want to achieve the objectives, given the challenges?'*

Through a participatory workshop (often no more than two to three hours in duration) the discussion of these questions can lead to a narrative regarding how to achieve the programme objective. By design, the narrative includes the points that stakeholders consider to be particularly relevant. This inclusion increases ownership of, and interest in the success of, the programme. The narrative also deals with the main challenges that the stakeholders anticipate will be encountered, and it identifies pathways to address them. This narrative then serves as a basis for the development of the ToC.

2. In order to prepare the data collection, implementers should then be asked: *'Which information do you need so that you know that you are on track to achieve what you set out to achieve – not only at the end of the intervention but charting the path during the intervention?'* The purpose of this question is to determine which data to collect. It also helps to determine the evaluation questions.
3. The third question programme implementers should be asked is: *'What do you want to do with the information, so that the evidence can help you to achieve what you set out to achieve?'* This question focuses attention on how the implementers want to use the evidence produced. This question tends to lead to reflection workshops, ideas for adaptation, and decision-making processes.

This conceptualisation of MEL in the programme cycle fits well with Ramalingam *et al.*'s (2019: 9) framing of the three stages of the programme cycle. Ramalingam *et al.* state that the 'assess and design' phase should focus on understanding the core problem and the design of appropriate portfolio interventions. The questions above outline how this can be done in practice. The simplicity of the questions makes them user-friendly and accessible across the team. This helps to ensure an adaptive project is inclusive; including individuals in the learning process is an important aspect (Valters *et al.*, 2016: 10).

This approach emerged from the MUVA programme. As stated earlier, we then applied it to the BRE-TA programme. In both cases, the approach has helped to build trust with the implementers, to clarify interventions, and to provide evidence for subsequent adaptation, as well as for client reporting.

## 4 Four MEL features for adaptive programmes

The MEL work within MUVA and BRE-TA provides lessons that could be useful for other programmes. Four features that can strengthen MEL during the implementation of adaptive programmes stand out, based on our experience with MUVA and BRE-TA. These are the following:

1. The ToC development process should include the implementers and should build on their motivations. This helps to increase ownership of the programme objectives. It also helps to ensure alignment of implementers' incentives with the programme objective.
2. Data collection and analysis should be explicitly synchronised with the learning and adaptation cycle in order to improve delivery.
3. Individuals who implement activities should be intentionally involved in the learning and adaptation process.
4. The MEL process should be placed within an institutional structure that drives the learning process, and that provides information for accountability.

### 4.1 A ToC development process built on implementers' motivations

#### 4.1.1 Introduction

This section argues in favour of a ToC process that includes the implementers and that builds on their motivations. The purpose of such a process is to build ownership of the programme, its objective and the ToC. The purpose is also to build a shared commitment to achieving the objectives of the programme.

Mayne (2017: 163) notes that '[b]road agreement among stakeholders would usually suggest a more robust ToC, often built up through a participatory approach to building the ToC'. Gutheil (2020: 135) finds that grassroots organisations experience less ownership of the ToC when the ToC creation process occurs at higher levels of the aid chain. This aligns with Valters *et al.* (2016: 10), who state that learning must be centred around the individuals and strategies involved in implementing activities.

The inclusion of the implementers in the ToC process can take many forms. We advocate for a ToC process that builds on implementers' motivations and that relates them to pre-stated programme objectives.<sup>4</sup> The hypothesis is as follows: if implementers see their own objectives as being part of the broader narrative of programme objectives, they will be more likely to consider the ToC their own (increased ownership), will be more committed to achieving its goals, and will be more likely to be interested in the results that derive from MEL activities that track the ToC.

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<sup>4</sup> The client is likely to have formulated objectives but may not be able to participate in the ToC process.



The issue of including implementers in the ToC process touches on some aspects that are worth mentioning. We consider the ToC as a mutually agreed vision of how change can be made. We find that it is important that there is:

- i) space for the admission that the ToC could be based on flawed reasoning or imperfect understanding of the context;
- ii) agreement on the need to examine this honestly as the process of implementation progresses; and
- iii) agreement that if there are missteps the premises can (and should) be reconsidered.

A related purpose of including implementers in the ToC development process is to introduce a questioning mindset at the beginning of the interventions. Put differently, the ToC development process aims to achieve a number of goals by involving the implementers, all geared towards increasing the likelihood of achieving impact.

#### **4.1.2 What we are doing in MUVA and BRE-TA**

In both MUVA and BRE-TA we carried out participatory workshops for the ToC development with those implementing the programme. The workshops took roughly no more than two hours. The workshops followed the outline described in Section 3. As a result, programme objectives were formulated in simple words that could be easily understood. This liberated the participants from the burden of professional ‘jargon’. The workshops formed the basis for the development of the programme ToCs. As part of the process, we also critically examined the expected pathways to change.

On the basis of the programme ToCs, ToCs for each workstream were developed in BRE-TA and for each project in MUVA. For example, a series of ToC workshops with multiple partners and implementers in the ‘Sonho Rural’ project (MUVA) were conducted<sup>5</sup>. This was crucial, in order to align expectations and to develop a vision of the women’s economic empowerment component in the overall DREAMS programme<sup>6</sup>, for which MUVA designed an intervention<sup>7</sup>, that was agreed upon by all stakeholders.

#### **4.1.3 Evidence**

This section aims to present evidence that supports the initial claim. The hypothesis is that a ToC development process that includes implementers and that builds on their motivations helps to lead to a shared commitment towards achieving the programme objectives, as well as helping to align implementers’ incentives among themselves and with the programme objective.

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<sup>5</sup> The ‘Sonho Rural’ project involved three major implementing partners and more than 10 community-based organisations and involved the addition of a women’s economic empowerment component to an ongoing programme. The cascade method of workshops built ownership of, and finally consensus on, the overall objectives of the women’s economic empowerment component within the DREAMS programme.

<sup>6</sup> DREAMS is a PEPFAR/USAID-funded initiative in Mozambique that is working to empower young women.

<https://mz.usembassy.gov/pt/our-relationship-pt/pepfar-us-presidents-emergency-plan-for-aids-relief-pt/dreams-pt/>

<sup>7</sup> For the DREAMS programme, ‘MUVA developed a new intervention to build the capacity of the implementing partner organisations (IP) to undertake the MUVA-designed training’ (FCDO Annual Review 2021)

[https://iati.fcdo.gov.uk/iati\\_documents/90000012.odt](https://iati.fcdo.gov.uk/iati_documents/90000012.odt), accessed on 3 April 2023

There is evidence that the inclusion of MUVA and BRE-TA implementers in the ToC development process has led to increased ownership and alignment. In the VfM assessment of the BRE-TA programme in 2020, it was noted that team members and stakeholders found the approach helpful and that it created consensus (OPM, 2021: 32).

With respect to BRE-TA, the team leader observed that team members are appreciative of a ToC process that has given their activities a stronger narrative.<sup>8</sup> Team members in BRE-TA expressed in interviews that the ToC process has ‘helped them to sharpen their thinking around strategic vision and direction, and the links from outputs to outcomes’ (OPM, 2021: 54). One team member described in an interview for the VfM report that the ToC process in BRE-TA has been a ‘game changer’ in regard to how to reflect on the programme. A similar expression was used to describe how the ToC has helped to build credibility with a sceptical client.

This latter point reinforces the notion that the ToC helps to build shared understanding and alignment around a common objective .

Moreover, according to circulated meeting notes, one donor has welcomed ‘the inclusion in the [monthly report] slides of the Theory of Change for each workstream and would like to see this approach adopted in the [proposals for new interventions] as well. [Arguing that t]his would help improve the ease of understanding of where a new [proposal for interventions] fits in with the broader vision and building blocks of the workstream ToC.’

Finally, a government stakeholder who was not involved in the workshops stated in a BRE-TA key informant interview conducted for the VfM report that he was keen on a ToC, seeing it as a way of pulling a fragmented set of ideas together. He stated that the ToC has been developed closely with the government and reflects government priorities (as it should). This can be seen as an extension of the point around building alignment around the ToC.

#### **4.1.4 Analysis – what the evidence does and does not say**

Naturally, there are limitations in the evidence discussed in this article, which is drawn from two programmes only. There are many factors that contribute to increased ownership of the ToC by implementers, such as the pre-disposition of team members to using a ToC and the programmatic space to revisit the ToC on a regular basis. There is no systematic evidence that shows that ownership of the two programme ToCs has been increased. However, the evidence *does* say that the ToC process has been useful for those involved. The evidence shows many instances of implementers referring to the benefits of the process in regard to clarifying their own thoughts and their communication with others, as well as in regard to building consensus. This points to the usefulness of including implementers in the ToC process.

It may be obvious, but ‘sharpen[ing] thinking around strategic vision and direction’ (OPM, 2021: 14) can only happen if the relevant people are part the process. It has been argued that including relevant actors can strengthen the ToC, as compared to less participatory processes (Dhillon and Vaca, 2018: 75).

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<sup>8</sup> The ToC process also identified so-called ‘building blocks’, i.e. headings under which each of the wide range of activities could be grouped. These headings (or ‘building blocks’) have made the ToC more easily accessible.

Such a clarification process also has the benefit of creating a shared understanding of the objectives, and the pathways to achieving them. The evidence cited above refers to the ToC process leading to consensus. The literature shows that it is often a challenge to get stakeholders from different backgrounds to agree on goals, which makes compromise necessary (Oberlack *et al.*, 2019: 109). Thus, the agreement achieved around MUVA and BRE-TA's ToCs appears to be an exception as regards ToC processes.

There is a further indication of the usefulness of the ToC that has not been mentioned so far: if the ToC is used subsequently and becomes a 'living document' that is updated and refined as needed, it seems fair to interpret this as a sign of increased ownership.

In the case of BRE-TA, the ToC is updated on an ongoing basis as the context changes and the programme adapts. For the MUVA programme, ToCs are updated as part of the structured learning processes embedded in the programme, revolving around the reflection meetings. They act as a diagrammatic reference that is used to check assumptions and progress towards goals. The ToCs developed for each intervention are therefore an integral part of the reflective learning sessions.

This resonates with the literature, which states that ToCs in adaptive programming are adjustable, based on reflective learning gathering during the implementation process. They are not an immutable blueprint but a continuous process (Oberlack *et al.*, 2019: 108).

#### **4.1.5 Conclusion**

The inclusion of the implementers in the ToC process of BRE-TA and MUVA has led to a clarification of thinking, and consensus. It has also led to greater appreciation of the ToC, and subsequent use of it.

There is a lack of specific evidence with respect to whether building on implementers' motivations in the ToC process matters. However, it seems plausible that if the ToC process builds on the motivations of the implementers and relates them to the programme objectives, the personal stake in achieving the change depicted in the ToC increases, as well as the collective commitment to doing so.

The ToC comes at the beginning of the design process, and hence also at the beginning of the involvement of MEL. With respect to the challenges identified in Section 1.1 regarding adaptive processes, involving the implementers in the ToC process is a way to build trust, in various ways. Involving the implementers builds trust between the implementers themselves and towards MEL. A clearly articulated ToC that is founded on what the implementers consider is achievable can also help to build clients' and stakeholders' trust in the programme. It thereby contributes to addressing the first challenge mentioned at the beginning: in order to learn, one needs to be able to admit mistakes, which in turn requires trust. The inclusion of implementers in the ToC process is one way to begin to build trust.

## **4.2 Data collection synchronised with the adaptation cycle**

### **4.2.1 Introduction**

A second key feature enabling successful learning and adaptation that is potentially useful for other programmes is the integration and synchronisation of MEL data collection and

analysis with the learning and adaptation cycle. This refers both to the timing of MEL data collection and the content. Put differently, we argue that, based on a ToC process that leads to increased ownership, implementers (practitioners) are invested in understanding whether their actions have the expected results. In this approach, data are used to measure achievement towards the mutually agreed results. If results are achieved there is the question why they have been achieved, and if not, why not. This increases interest in the data. It is also the key to questioning, and assessing, how robust the original ToC is.

#### **4.2.2 What we are doing in MUVA and BRE-TA**

In MUVA, we have developed a structured reflection and adaptation cycle and have identified what evidence is needed. Following this, we generate the evidence in time for reflection workshops. In BRE-TA we have also developed a reflection process and have identified relevant evidence.

This evidence can take many different formats. In MUVA it includes monitoring data (e.g. attendance records), as well as evidence from baseline, midline, endline, and follow-up surveys with participants, to measure, for example, the effectiveness of the interventions. In addition, it consists of evidence from focus groups and key informant interviews with participants and practitioners. There are also observation exercises. Some of the data collection is conducted to help evaluations check whether an intervention is working. For example, in MUVA we use survey data to carry out quasi-experimental evaluations. In BRE-TA the data consist of data from key informant interviews with government counterparts and technical assistance providers.

A key consideration is the timing of data collection. Data collection methods might need to be adapted to ensure that data are available and analysed in time. In MUVA and BRE-TA, the data are collected in such a way that they can feed into a regular learning and adaptation process. This may appear to be challenging. However, once the timetable for the reflections is set, it is possible to plan and adapt the data collection and analysis accordingly. For example, if an evaluation uses a quasi-experimental design it may not be ready to feed into the next reflection cycle but it can be set up to inform the subsequent reflection round.

In MUVA, the evidence feeds into a structured reflection and adaptation cycle that happens twice a year, both at the programme and project level. This is resource intensive. However, it ensures that systematic learnings happen. In BRE-TA the learning cycle was initiated more recently. In the first round, the data fed into four learning workshops.

It may be argued that regular reflection workshops, such as every half year, lead to too-short cycles, which may prevent rigorous data collection. However, in MUVA we have found that, with good planning, a lot of data can be collected and analysed within the relevant time period (half a year in this case) to feed into the next reflection session. This frequent data collection to inform learning is an important element of adaptive programming.

We have found that for those collecting and analysing the data, providing data for reflection sessions acts as a strong motivating factor. The knowledge that the information will be actively used and will lead to change is motivational as regards producing '*just in time data*'. This aligns with what others have found regarding the importance and use of evidence in adaptive programmes (Ramalingam *et al.*, 2019: 3).

Another aspect is that the data collected ahead of the reflection workshops need to be in a manageable and digestible format (infographics, PowerPoint presentations etc), rather than lengthy reports. PowerPoint presentations may take less time to produce than a written report. In the case of MUVA, this helps with providing '*just in time*' data and analysis that can be processed for use in the reflection sessions. Often, the conclusions arising from the data are generated in the reflection workshops with the input of the implementers.

### **4.2.3 Evidence and analysis**

There is evidence that the data shared at learning workshops are considered useful and are used by the implementers for determining the way forward. For example, in the four BRE-TA learning workshops conducted so far, challenges identified through key informant interviews were chosen by workshop participants as top priorities for developing solutions. Indeed, a couple of participants explicitly mentioned in the workshop evaluations that the interviews have helped inform the discussion and priorities.

The MUVA 2018 VfM report states that the process of bringing the MUVA team together at regular intervals for learning and adaptation purposes at reflection workshops is 'greatly enhanced, [...] through the collection of monitoring and evaluation data' (King and OPM, 2018: 38). This finding is echoed in the five-year VfM evaluation, which reports the benefits of data being collected ahead of reflection workshops (OPM, 2021).

The examples above show that the evidence provided is used to identify a way forward for future adaptation. Although this finding cannot be extrapolated automatically to all programmes, there is a compelling argument that accessible information, provided in a timely fashion, is a useful tool in the decision makers' toolbox.

### **4.2.4 Conclusion**

As stated above, feeding evidence into learning workshops can be done in such a way that participants actively use the data to identify solutions.

With respect to the challenges identified in Section 1.1 regarding adaptive processes, the process of feeding evidence into learning workshops, and thereby into the adaptation cycle, addresses the fact that decision-making requires rapid feedback loops, while still demanding rigorous data. This is needed in order to take measured decisions on adaptation. In order to achieve a positive outcome it is important to ensure that the information is relevant, timely, and accessible, and that it provides a basis for a constructive discussion.

## **4.3 Implementers' involvement in the adaptation process**

### **4.3.1 Introduction**

Brinkerhoff *et al.* (2018: 6) find that holding structured and unstructured learning sessions is important for MEL in adaptive programmes. Agreeing with this finding, we also argue that it is important to involve the people who are implementing interventions in the reflection and adaptation process. Doing so is likely to increase the viability of solutions and the likelihood that suggested adaptations will be implemented. The importance of including implementers has been underlined by various authors, including Gutheil (2020: 135) and Valters *et al.*

(2016: 10). Those implementing the programme activities have an intimate knowledge of what works and what does not work in a specific context. They will also have ideas on how an intervention can be improved. If they are included in the process of generating suggestions for adaptation, they will be more likely to 'buy into' implementing these ideas.

### **4.3.2 What we are doing in MUVA and BRE-TA**

MUVA and BRE-TA explicitly involve the individuals who implement activities in the learning and adaptation process. In fact, the MEL system has been designed based on the conviction that the end-user of the evidence is the implementer (in MUVA this is often local organisations which are carrying out activities). For example, monitoring information is not used solely for upward accountability: instead, the information is shared with the implementer to support their work.

As stated in the previous section, the information is used as part of ongoing discussions and as part of structured reflection sessions. In the MUVA programme, instilling the habit among implementers of consulting monitoring data has given rise to an increased demand for additional information. For example, there have been requests for rapid surveys to ascertain the reasons for female drop-out or to obtain more information on the reactions of households and the wider community. The formal process of using information in the two programmes is put into action through reflection workshops.

In the reflection workshops, the two programmes place a strong emphasis on providing a 'safe environment' for implementers to speak. Provision of a 'safe space' increases the chances that participants will express what they are experiencing and will engage with the evidence. This includes admitting that the intervention is not working as expected, either due to operational glitches or failures in the causal logic. The ability to reflect at this level and depth allows for solution-finding and innovative thinking – leading to an increased likelihood that the intervention will be successful (see also Section 4.3.3 and the MUVA'titude example).

The provision of a 'safe space' requires careful consideration as to who participates in the workshop and which information is shared. In BRE-TA, for example, the programme management was not part of the first set of learning workshops that happened at the workstream (project) level. To deal with existing hierarchies among participants, it helps to be mindful of hierarchies in the composition of sub-groups for exercises. With respect to confidentiality, we made sure that the results from the first BRE-TA learning workshops were shared with management only if we had received permission from the workshop participants to do so.

The importance of a safe environment is reflected in the literature. A safe environment has previously been found to be one that is built on mutual trust, where implementers 'feel able to discuss challenges and failures without the fear that their funder would withdraw' (Valters *et al.*, 2016: 20). Laws *et al.* (2021: 6) find in their analysis of the LearnAdapt programme that an adaptive programme needs to involve 'learning through honest reflection, not only on achievements and progress but also on setbacks and challenges, and empowering delivery teams to take risks and experiment.'

In addition to the emphasis on a 'safe space', there needs to be an emphasis on the subsequent feedback and approval process. Some ideas for adaptation will require approval

from a higher level of authority, such as the programme management or the client. If this is the case, it is important that feedback is provided and that decisions are made in a timely manner. Implementers need to be able to see that it is possible to improve things – that their considered opinions have been heard and acted upon.

In sum, MUVA and BRE-TA are both set up to include implementers in the learning and adaptation process and to provide information to them. They emphasise the importance of a 'safe space', as well the relevance of subsequent feedback and decision-making.

### 4.3.3 Evidence

This section aims to provide evidence on the benefits of including implementers in the reflection and adaptation process. The evidence that we have shows that holding reflection workshops with implementers leads to successful adaptation.

First of all, we argue that the reflection cycle is an effective tool for adaptation.

Let us start with the most radical form of adaptation: namely, stopping an intervention. This is difficult, as there are vested interests in keeping things going. Also, there is always the possibility that another tweak may lead to success.

Given the difficulty of stopping interventions, the following is all the more noteworthy: according to the 2021 VfM report for MUVA, of 24 projects undertaken, seven have been exited. In MUVA, most of the relevant interventions had three cycles of adaptation before being stopped. Exits happened if several adaptations do not lead to the desired result or if the circumstances change.<sup>9</sup> The exits happened after six to 24 months of activities, depending on the size and length of the intervention.

While this example shows the effectiveness of the reflection cycle, it does not directly speak about the benefit of including implementers in it. The following example may therefore be useful.

MUVA's experience provides multiple examples of project-level reflections and ways in which learnings are used for subsequent iterations (King and OPM, 2021). MUVA's learning and adaptation cycle included 27 project reflection workshops and six programme reflections between 2015 and 2020 (King and OPM, 2021). The effectiveness of this endeavour is apparent in the exiting of projects referred to above, as well as the adaptations that are applied.

The case of one project, called MUVA'titude,<sup>10</sup> may serve as an illustration of a project that was adapted (rather than exited). In this case, the inclusion of implementers allowed for an in-depth reflection that led to the development of two viable options. The background is as follows. A soft skills training project (*MUVA'titude*) worked with young people to improve their communication and team-working skills. This was done in conjunction with a vocational training provider. Initial data showed that the training worked: participants were building communication skills and team-working skills. However, drop-out rates were high among the less literate. It became clear that a minimum literacy level was required to undertake the

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<sup>9</sup> For example, in one case a mayor was assassinated who had provided crucial political support for a project.

<sup>10</sup> Muva'titude YouTube video: [www.youtube.com/watch?v=6ljfqx-jsc](https://www.youtube.com/watch?v=6ljfqx-jsc).

training successfully.<sup>11</sup> During a reflection workshop with implementers two options were developed: (i) to change the training, or (ii) to set a minimum literacy requirement and develop a separate intervention for the less literate. Option (ii) implied a departure from the original aim of working with the most vulnerable in this intervention. This was a difficult decision to take, and reflecting about it jointly with those most committed to making it work was crucial for the development of acceptable and viable options. In the end, the second option was chosen, as it made it possible to build on the success of the soft skills training (Riemenschneider and Holland, forthcoming). As a consequence of setting minimum literacy criteria, drop-out rates declined. Later on, an impact assessment showed that participants in the training were more likely to be in remunerated work than their peers. This example shows how an early reflection of the data led to adaptation and an ultimately successful intervention. It is also an example of a case where successful adaptation followed on from the full involvement of implementers in the reflection.

Two more examples of project exits in MUVA illustrate the importance of the context that was provided by implementers.

The first example concerns a project that provided basic career guidance sessions to final-year high school students. The data from the project indicated that change was achieved at the level of pupils' sense of direction, realistic aspirations, and inspiration, which indicated the success of the project. However, after the first cycle, and during the reflection sessions, the implementers (teachers) categorically stated that, despite the interesting findings, they did not have a mandate from the Education Ministry for providing career guidance, and therefore could not commit time or space to these activities. This was despite national policy documents stating that giving careers advice is part of a secondary school's responsibility. After the reflection, MUVA management took the evidence and information from the reflection to higher authorities in the Education Ministry and confirmed the lack of traction for the idea. Outside of the reflection space, difficult decisions were taken to not commit further MUVA resources to a second iteration of project implementation.

Another early exit was decided upon due to the following factors: 1) the evidence that the impact on the participants was low; 2) no improvement was found, despite a series of iterations of the project activities and the measurement framework; and 3) there was an extremely difficult and non-conducive operating environment. This led to the difficult decision to exit the project. This was particularly painful for management as there were resource allocation decisions that impacted on the people working on the project. They had committed fully to the goal of the project. The implementational partners had 'travelled the road with MUVA' and so the decision impacted on them. In addition, the decision was difficult because it had the potential to jeopardise the sense in the organisation of providing a 'safe space' for reflection. Nevertheless, the decision was taken. This shows that the involvement of implementers in the reflection process allowed for difficult decisions to be made.

MUVA's ability to adapt successfully, and the benefit of bringing implementers into the process, is also apparent from the following observations:

- According to the MUVA 2018 VfM report, an investment in reflection and learning need not be expensive to be worthwhile: it was found that there is significant value in bringing

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<sup>11</sup> Albeit within the target group of disadvantaged urban youth that were not in school, education, or work.



the MUVA team and partners together at regular intervals to elicit and document practice-based learning, and to use that learning for adaptive management.

- The Department for International Development (DFID) (now FCDO) Head of Innovation, T. Gitsoff, has noted that 'DFID's star LearnAdapt Innovation programme, MUVA, is working with 'Learn Impact methods and a culture of innovation to focus on what works. They are well ahead of the curve. It is really worth digging into how they set up MUVA.'

Finally, MUVA's ability to adapt to a changing context (even if there is no explicit mention of the implementers' roles) was also evident during the COVID-19 pandemic as MUVA was able to quickly respond to the health situation and community needs (FCDO, 2021).

The learning workshops in BRE-TA have only started recently. However, what can be said is that 19 out of 20 participants considered them to be good or excellent. While the workshop facilitators have questioned whether simple politeness may have driven these assessments, informal feedback supports their usefulness, as does both attendance and attention demonstrated during the virtual sessions. The participants stayed longer than needed and stated without prompting that they wanted to use the workshop tools for related work. While it is too early to know whether adaptation has happened as a result, the workshops are seen by implementers to be useful.

Hence, in sum, it can be said that, under both MUVA and BRE-TA, the workshops that include implementers are considered useful. In the case of the longer-running MUVA programme, they also lead to adaptation.

#### **4.3.4 Analysis**

The evidence from MUVA and BRE-TA shows that structured learning and adaptation cycles that involve implementers lead to changes, including exits from interventions. It seems safe to assume that the inclusion of implementers helps to provide in-depth knowledge of the context and of feasible solutions. In some cases, this link is made explicit, such as in the case of the career guidance project. It is also likely that their inclusion increases implementers' willingness to implement the solutions they suggest.

The evidence shows that the process of sharing information with implementers and including them in the adaptation process leads to both early exits and impactful projects, resulting in an efficient use of resources. This process requires careful management to ensure that the learning culture in an organisation is preserved.

The reflection and adaptation process can work in difficult circumstances and still contribute to adaptation (even in the extreme form of exiting the project). Including implementers in this process increases the chances that all options for project improvement will be considered, before a drastic step, such as exiting, is taken.

#### **4.3.5 Conclusion**

The evidence discussed above shows that a structured learning process that includes implementers is instrumental in regard to leading to timely adaptation, improvements, and exits in the two programmes (MUVA and BRE-TA).

The ability to continue to learn and adapt as new information emerges is an important aspect of adaptive programming, as emphasised by Prieto-Martin *et al.* (2017: 22). Ramalingam identifies three key areas of adaptiveness: 'better knowledge, better anticipation and adaptation, and better response' (Ramalingam, 2013: 344). To that end, the ability to pick up and act on projects performing in an unexpected way indicates that the MEL system within the MUVA programme is rooted in an adaptive approach.

With respect to the challenges identified in Section 1.1 regarding adaptive processes, this feature of including implementers helps to facilitate learning, as one needs to (make and) be able to admit mistakes, which requires trust.

It is worthwhile to reflect on this issue of trust from a broader perspective. Several thinkers see trust as an important facilitator of adaptive programmes (Laws *et al.*, 2021: 1; Prieto-Martin *et al.*, 2017: 32; Rogers and Macfarlan, 2020a: 4). The broader issue at stake is to try to bring trust and mutual accountability together. Trust enables innovation, adaptation, and excellence, whereas accountability constrains and confines the willingness to experiment, and encourages 'playing it safe' and concealing mistakes. On the other hand, where there is no accountability, there is a risk of sinking to the lowest common denominator. The 'glue' that sticks this process together is reflective learning that provides a physical and mental space for all stakeholders to consider the evidence and their experience (as practitioners and as participants), and to provide arguments for change (if necessary) and for ways forward. This process can be placed within a framework of accountability.

## **4.4 MEL process placed within an institutional structure that allows for accountability**

### **4.4.1 Introduction**

The MEL process needs to be placed within a clear structure that allows for accountability to the client.<sup>12</sup> There needs to be an ability to provide evidence of progress, as well as evidence that underlies decisions for adaptation. As stated earlier, accountability has often been interpreted as 'accountancy', with little focus on programme learning (Valters *et al.*, 2016: 19). It has even been said that it prevents learning.

There are two ways to move away from 'accountancy' that are relevant to the two programmes discussed in this article. The first approach is indirect. This approach starts with giving implementers the information they need in order to know whether they are achieving what they set out to achieve. Doing this enables learning about progress, what works, and what needs to be improved. This is also what the client wants to know. From the information given to implementers, a relevant subset can be given to the client.

The second approach in order to move away from 'accountancy' is direct: it involves feeding the evidence into reflection workshops, which in turn lead to decision-making and adaptation. These decisions will be easier to explain to a client if the underlying evidence can also be

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<sup>12</sup> For the purposes of this article, clients are understood to be those who provide resources or funds for the interventions, such as donors, governments, or private organisations.

provided. The structured learning process enables such an approach. It thereby increases the options for accountability to the client.

In our view, adaptive programmes are highly accountable – not only to those providing resources, including CEOs and ministers, but also to the people who are implementing programmes and the people taking part in them.

#### **4.4.2 What we are doing in MUVA and BRE-TA**

As stated above, the MUVA and BRE-TA programmes are set up to provide information both to implementers and clients and other stakeholders. The aspect of engaging implementers has been described in the previous sections. In addition, MEL uses a subset of the information received to provide evidence that underlie decisions on adaptation, as well as information on progress against the agreed ToC.

In BRE-TA the reporting to the client is based on the ToCs developed with the workstreams and the data collected to determine progress. The reporting happens monthly, quarterly, and annually. As the reflection workshops have started only recently, the aspect of using evidence to underpin decisions for adaptation has yet to be realised.

In MUVA the structured learning process includes the ability to trace how evidence feeds into decision-making. This in turn can be used for accountability purposes. MEL provides information for the reporting. The reporting is based on the logframe, which in turn is based on the ToC. If, for example, an intervention is stopped, this decision can be backed up by the evidence that led to the decision. In addition, there is regular quarterly and annual reporting. There are also regular meetings to discuss the direction of travel of the programme. These are based on the aggregated evidence from the individual projects and deliberations from the reflection sessions.

As the people involved in the two programmes are invested in learning, and have committed resources to the process, a process has been developed to enable the virtuous cycle of establishing common goals, testing, learning, and adapting.

#### **4.4.3 Evidence**

With respect to progress reporting, it may suffice to point to the progress reports that are produced on a monthly, quarterly, and annual basis. These provide evidence of progress in line with the programmes' ToCs.

With respect to evidence-based decision-making, as stated earlier, decisions are made based on evidence, including to stop projects (see Section 4.3.3). This is also reflected in the MUVA Five-Year VfM report (King and OPM, 2021), where, for example, the exit from one of the projects is argued for on the basis of mixed evidence of its success.

At a broader level, in three subsequent independent VfM evaluations of MUVA, King and OPM (2018, 2020, 2021) found that the integrated MEL cycle is a key mechanism for ensuring the success of the MUVA programme. Moreover, MUVA has consistently been rated highly by the client (achieving the high score of an A\*), has obtained a programme extension, and has received support for the spin-off of an NGO established in Mozambique. BRE-TA also received an A\* score in 2021 and has been extended until 2024.

#### **4.4.4 Analysis and conclusion**

The evidence shows that it is possible to report a subset of the information available to MEL to the client. This can provide clear and transparent information on progress and can substantiate decisions taken based on evidence (data and deliberations from reflection sessions). In the two programmes, the use of an independent and adapted VfM process that draws on MEL data further strengthens accountability.

On this basis, it can be argued that in MUVA (and also in BRE-TA) the emphasis has moved from an 'accountancy' approach to focusing on creating accountability through adaptation.

With respect to the challenges identified in Section 1.1 regarding adaptive processes, this feature addresses the challenge that clients need reassurance that results will be produced.

## 5 Relationship between challenges and key learnings

The features identified above are well-placed to address the challenges identified in Section 1.1 regarding adaptive processes. These challenges are repeated here for ease of reference:

- To learn, one needs to make, and be able to admit, mistakes, which requires trust.
- Clients need reassurance that results will be produced.
- Decision-making requires rapid feedback loops, while still demanding rigorous data.

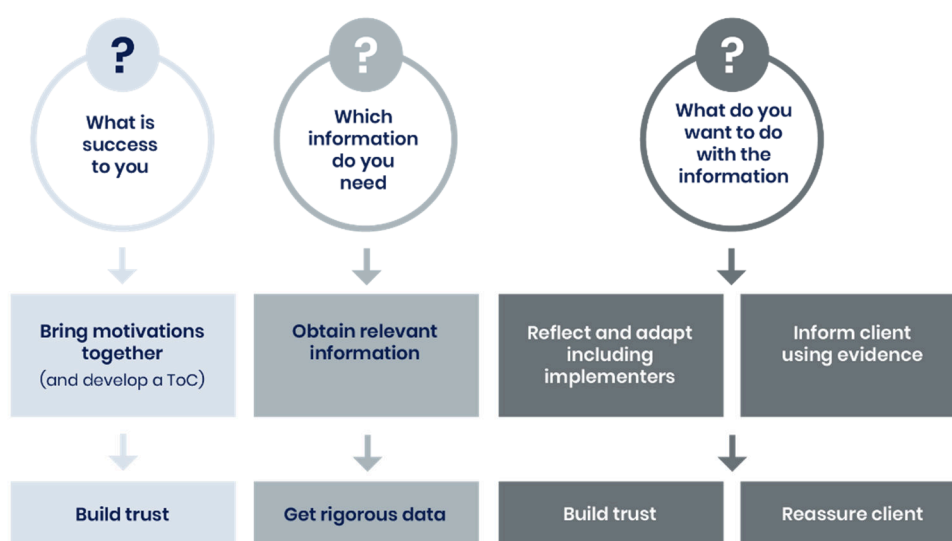
Of the four features we have outlined, two address the challenge of building trust. The inclusion of implementers in a motivation-based ToC development process as well as in the adaptation process help to build trust. Reassurance to clients is provided by placing the MEL process within an institutional structure that provides information for accountability purposes. Synchronising rigorous data collection with the learning cycle ensures rapid feedback loops for decision-making. The table below makes the links more explicit.

**Table 1: Relationship between challenges and key learnings**

Challenges	Key learnings that address the challenges
To learn, one needs to make, and be able to admit, mistakes, which requires trust.	ToC process that builds on implementers' motivations and leads to increased ownership and alignment. Implementers involved in the adaptation process.
Clients need reassurance that results will be produced.	Structure for accountability.
Decision-making requires rapid feedback loops, while still demanding rigorous data.	Data collection synchronised with adaptation cycle.

This is also summarised in Figure 4 below.

**Figure 4: From questions to results**



As is often the case, addressing these challenges is important in order to ensure work is successful.

## 6 Final considerations

This article has looked at the MUVA and BRE-TA programmes to understand how MEL can be leveraged to support adaptive programming to respond to key challenges in the operationalisation of learning and adaptation. The three challenges addressed herein relate to the ability to admit mistakes, reassure clients, and provide rigorous data just in time for feedback loops.

The experience within the two programmes illustrates that there are ways to address these challenges through the MEL function. This means including implementing actors in the ToC process, ensuring a shared understanding and commitment that helps to build trust. Indeed, when those implementing activities are explicitly involved in the learning and adaptation process, it provides a 'space' to admit mistakes and improve what is being undertaken. This trust is an enabling feature for creating a learning space. Moreover, the MEL process needs an institutional structure that allows for accountability, while continuously learning within, and adapting, the programme. Again, this structure ought to include relevant stakeholders. The aim is to reduce the sense of MEL as an audit function: MEL should have a facilitative function, rather than being an inhibitor.

The examples of MUVA and BRE-TA illustrate that there does not need to be a trade-off between rapid feedback loops and rigorous data. In these programmes data collection and analysis is explicitly synchronised with the learning and adaptation cycle. This has been proven to improve delivery by producing evidence that is manageable and digestible and that can feed into reflection sessions – and finally to decision-making.

We have found that using the key features identified in this article can place MEL closer to the centre of the entire programme cycle, starting from the design phase. It can also improve design and implementation, thereby increasing the likelihood of achieving impact.

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