ACDI VOCA

Expanding Opportunities Worldwide

Private Sector Engagement Toolkit

Co-Creation with the Private Sector

September 2022

Introduction to Co-Creation

USAID defines co-creation as "a design approach that brings people together to **collectively produce a mutually valued outcome**, using a **participatory process** that assumes **some degree of shared power and decision-making**."[1]

Through co-creation, we go beyond knowledge sharing or learning from various stakeholders and **move toward interactive and ongoing engagement** with those who are affected by or are well-positioned to address an issue. We are **thinking with** key partners and stakeholders.

Co-creation is an important component for developing partnerships that create systemic impact – or what we would call **transformational partnerships**. These types of partnerships lead to more enduring results that catalyze changes in social and business norms, shifts in market system and network structures, or influences industry-wide behavior. In other cases, this could be more business model specific- influencing lead firms to pull in other SME's into their business operations, creating sustainable win-win partnerships.

Typically, in these partnerships ACDI/VOCA plays more of a **facilitative role** that is based on a participatory, iterative approach to implementation that puts market actors and local stakeholders in the driver's seat. Facilitating transformational partnerships is about shifting our behavior from one-off firm engagement to seeking to create broader change by leveraging the capacities and incentives of a portfolio of actors. It could involve tactics like forming business cohorts, crafting multi-stakeholder alliances that address policies, partnering more with member organizations and media partners — not just private sector firms — or having a special fund for "second movers" to reinforce systemic change outcomes.

Co-creation is **flexible** and can **take many forms**, including one-on-one sessions between ACDI/VOCA staff and a private sector firm, in collaboration with a small, focused group, or in a large group of stakeholders focused on a particular challenge.

The most common examples within ACDI/VOCA's portfolio are:

- **Collaboratively designing a development activity** with a local partner based on shared interests and respective areas of expertise. The goal is to transform business incentives into developmental impact. For example, the Agriculture and Food Systems Development Activity
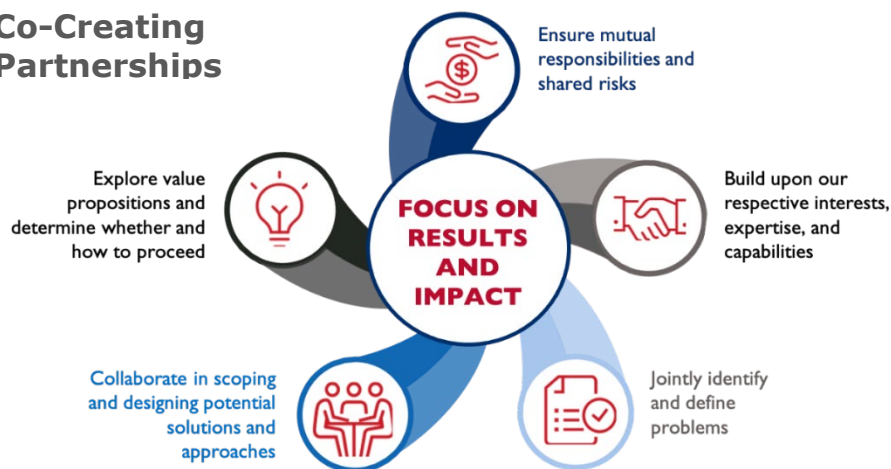
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[1] [USAID Co-Creation Discussion Note](#), 2017

(AFDA) co-created with private sector firms in Myanmar to address critical constraints preventing access to markets, agricultural services and inputs by smallholder farmers especially ethnic groups, women, and youth. The co-creation process also sought to identify ways to increase the productivity, inclusiveness, and competitiveness of key market segments in the prioritized agricultural sectors. The Transforming Market Systems (TMS) Activity in Honduras also finds way to collaborate with firms towards a common goal without providing direct financial resources to them. Theses collaborations may include coordinating on parallel activities (such as funding different studies or workshops to better understand the issue), providing technical assistance, or facilitating networking opportunities for the firm. This "lighter touch" collaboration allows both sides to test the relationship and advance their understanding of the issue together.

- **Bringing together a diverse set of stakeholders** to build a shared understanding of a market system and identify high-leverage opportunities for collaborative action (such as sector-wide alliances, value-chain integration using a shared platform, or multi-stakeholder alliances) that will make the market system more resilient, competitive, and inclusive.

There are many different types of actors that can be involved in the co-creation process. This toolkit in particular focuses on **how to effectively co-create with the private sector**. The image below provides important factors to keep in mind when engaging them in this process.

Co-Creating Partnerships

Ensure mutual responsibilities and shared risks

Explore value propositions and determine whether and how to proceed

FOCUS ON RESULTS AND IMPACT

Build upon our respective interests, expertise, and capabilities

Collaborate in scoping and designing potential solutions and approaches

Jointly identify and define problems

Source: USAID

Gender, Youth, and Social Inclusion (GYSI) Considerations

- Ensure the **process itself is inclusive** – do we have the right team members participating and giving input? Are the processes for identifying potential partnerships and conducting the co-creation inclusive?
- Consider how the co-creation process can **create inclusive outcomes**. How can it help address gender gaps identified in market analyses? How can it create win-win social and economic gains for partners and projects (and possibly triple win to include positive environmental impacts through climate-smart technology/practices)?

Overview of Process

We go through several phases during the co-creation process as we seek to develop and form a partnership with the private sector. This entire co-creation process is crucial for us to build rapport, and as such, we need to orient each phase so that it nurtures a **fruitful and solid relationship** with our partners. This will pay dividends in the future during implementation and create a culture where **adaptive management** with the partner happens more effectively.

An important consideration during this process is to **recognize and acknowledge the different cultures** between development organizations and private sector firms. As you are moving through the co-creation process, try to **find ways of working that will resonate with the firms' way of operating**. For example, how do private sector firms in your area prefer to meet? Do they prefer to work in 30- or 60-minute increments (compared to day-long workshops)? Do they use a set agenda? How much time do they typically spend on relationship building aspects or going deep on an issue?

Second, **pay attention to the terminology** being used during this process, and consider creating a shared glossary. It is important during this process to **spend enough time incorporating each other's voices**. If we're working across a diverse set of stakeholders, we need to be more mindful of incorporating one another's voice. In addition, some of these organizations and firms (as well as activity staff!) may bring a more "traditional" understanding of the role of donor organizations – primarily, as a grant funding source. It is important at the outset of these co-creation processes to signal what will be different about this approach, and the type of collaboration and co-investment expected from each partner.

Co-creation processes work particularly well under these conditions:

- *The problem is not clear, and you want to build a strong analysis rooted in multiple, diverse perspectives.*
- *Multiple viewpoints will help to identify parameters, validate and prioritize focus areas, or identify opportunities for collaboration.*
- *You are willing and able to engage as equal partners in a shared decision-making process.*
- *You are interested in a more inclusive, collaborative, creative, and open design process.*
- *There is a clear return on investment for partners willing to engage in this process, that allows both them and us to achieve something different together.*

Third, consider **whether or not you are asking competitors to come together and collaborate.** If that is the case, you will need to consider how to **set the tone** of the co-creation sessions to encourage participants to take off their individual firm hats and figure out ways to look at problems that impact them all and to draw upon each other's collective wisdom. Co-creation is an untraditional process that involves trusting and engaging with members of other organizations. You will also want to consider what firms will be comfortable sharing with their competitors, and how to make sure everyone has **access to similar information** about the process.

The phases outlined below are geared towards a **co-creation process where individual private sector firms co-create with ACDI/VOCA** to design and implement a partnership. Broadly, these phases include:

Phase 0: Determine Purpose and Approach We Will Use	Phase 1: Selection of Partners	Phase 2: Preparation for Co-Creation	Phase 3: Co-Creation for Partnership Formation	Phase 4: Formalizing Award or Agreement	Phase 5: Reflect

Typically, this type of co-creation is a **time-limited process** that focuses on tapping into a range of skill sets, resources, and perspectives to **generate a specific outcome** that all partners at the table feel invested in carrying out. It is meant to be an **open**, creative **back-and-forth** process with various relevant actors that can help solve a specific challenge and play a key role in implementing the solution.

Gender, Youth, and Social Inclusion (GYSI) Considerations

- Not all partnerships are going to have a strong focus on inclusion depending on the co-creation goals, context, and sector but it is important to **identify partners** who are willing and have the **potential to create inclusive outcomes at the outset**.

- Avoid focusing on project gender targets and using that as a reason for why firms should care about inclusion. Instead, the best practice is to **focus on the business case for inclusion of women, youth, and other populations**; how firms may be missing out on business opportunities; what could be done to take advantage of the opportunities; and how the project can support them in order to benefit their business. Ideally, have targeted data and evidence to make the case before meeting the partners.

- Involve a **GYSI team member in reviewing any documents or materials** developed during the co-creation process to raise questions or make suggestions to better align with GYSI considerations.

Phase 0: Determine Purpose and Approach We Will Use

During this phase, the team should seek to answer and agree upon the following questions:

- What is the desired outcome?

- How does this co-creation process fit in with desired changes for the overall market system?

- How long will this co-creation experience last?

- Who needs to participate?

- What are participants expected to give? (This should include any co-investment expectations.)

- What can participants expect to get?

- What are your staffing resources during the co-creation process, along with any budget implications for hosting the workshops / meetings?

- Does the co-creation involve an imminent procurement, another type of formal agreement, or none of the above? If it does involve procurement, which mechanism fits best?

- What do we want our portfolio of partnerships to look like to ensure these various interventions can allow us to achieve systemic change?

- What kind of support can the team make available to firms during the co-creation process as they develop their concept notes / application?

- How will decisions be made between ACDI/VOCA and the potential partner?

- How will you ensure that participants from diverse organizations, sectors, and regions are able to engage?

Gender, Youth, and Social Inclusion (GYSI) Considerations

- Are there any desired **GYSI outcomes**?

- If using a procurement process, will it **reach women and youth-owned firms or organizations**? Do you need to make special efforts to reach these types of partners?

- Is the ACDI/VOCA **project team** prepared to **engage with partners on GYSI topics and targets**? Do they understand and can convincingly make the case for integrating gender into the process and partnerships?

Phase 1: Selection of Participants There are different ways that firms can be identified to engage in the co-creation process:

- **Co-creation partner identification**: Will you choose target partners through stakeholder research, network analysis and/or market systems actor map, by soliciting Expression of Interests (EOIs), issuing open invitations, or by expanding social networks through existing partnerships? Will you be choosing participants by region, topical interest, influence on relevant systems, or level of existing familiarity and trust? What types of firms will you target? What representatives from those firms need to be "in the room" during the co-creation process (i.e., CEO, business manager, financial officer, etc.)?

- **Value Proposition**: Next, consider the value proposition for those firms. The first and most obvious is the promise of an award, but past co-creation processes have taught us that firms

often value networking opportunities even more. Consider not just what potential benefits firms might gain, but also their relative cost for participation—for example, time, travel, intellectual capital, etc.—and work to set up clear and reasonable trade-offs for them.

- **Invitation**: Issue an invitation or a call for expressions of interest (EOIs) or applications that clearly communicates this value proposition, and your objectives, to potential firms. Be transparent about the expected parameters of the co-creation effort, including aspects that are not yet known, and your expectations regarding co-investment in partnership activities.

- **Selection**: If you have issued a call for EOIs, match your requirements and selection criteria to your objectives. If you want to bring in smaller firms, for instance, their EOIs might not reflect your typical expectations for organizational capacity. As you think about the selection, also consider the industries/sectors they are engaged in and the technology or service being commercialized. This will create a diversity of actors across the targeted market system and potential interventions responding to different areas of a project's vision for systemic change.

> *What is an **Expression of Interest (EOI)?***
>
> *In an EOI, organizations briefly outline a method for addressing the problem or opportunity and illustrate their institutional capacity instead of putting forward a detailed solution (like in a full proposal). The organizations with the most promising EOIs are invited to participate in a co-creation workshop during which they engage in design-thinking activities to move beyond their initial EOI and develop new solutions together with ACDI/VOCA and potentially other firms.*

Gender, Youth, and Social Inclusion (GYSI) Considerations

- Consider including a **GYSI lens in the EOI**: highlight specific gaps for women or youth and desired outcomes; include questions that will help to establish inclusion as an important aspect of the partnership from the outset.

Phase 2: Preparation for Co-Creation Once firms are selected to engage in the co-creation process, you will want to invest time and energy in getting them prepared for this process.

- **Ensure the firm knows what to expect.** Before the first formal co-creation workshop/meeting, reach out to the firm via calls and emails to clarify the kinds of collaboration expected, amount of time that is required from them, precisely what their roles will be during the co-creation and who should attend, and how they can prepare in advance. Also send an agenda/talking points in advance of the call to make sure everyone is on the same page.

- **Identify what kinds of knowledge deficits that might need to be addressed.** Co-creation events often include framing presentations and other forms of teaching. Other, more informal processes should include some type of sharing of what each participant knows and setting a common foundation for collaboration. Your task is to prepare for this in advance, first by

considering what kinds of knowledge are essential, and then by producing framing presentations for the first workshop/meeting.

- **Design the initial workshop/meetings**: Plan carefully a series of activities that give participants opportunities to get to know each other, work together, and align on shared ideas or commitments.

Gender, Youth, and Social Inclusion (GYSI) Considerations

- Some partners may not be as attuned to GYSI issues so this would be a good opportunity to **prepare GYSI information and/or points about the business case** to get partners thinking about this as they move into the next phase.

Phase 3: Co-Creation for Partnership Formation This is the core phrase of the co-creation process. The main stages for this phase include:

- **Introducing**: Better understand who is involved in the process, roles and responsibilities, desired goals, and what each side is bringing to table and what they expect to get from their engagement. From the beginning, you will want to make sure we are setting a collaborative tone and demonstrating that we have each other's best interests in mind while staying focused on the larger development outcomes.

- **Framing**: Establishing shared understanding of the context, how our interests align to desired objectives, and the unique value each partner can bring to the potential partnership.

- **Ideating**: Merging ideas to create a partnership that will achieve both development and business objectives. This is the stage where we ask questions and clarify our concerns, **adapt where needed**, and continue the process to align objectives. In this stage we look into **additionality** to understand whether market actors are requesting funds for 'business as usual' ideas or they are coming up with innovative new solutions to market constraints, that are inclusive and sustainable. During this phase, we should ask ourselves "how are we enabling the company to do something it would otherwise not be able to do without our support."

  o From ACDI/VOCA's perspective, two important aspects to incorporate into the partnership design are gender equity and women's empowerment and positive youth development. Positive youth development (PYD) focuses on youth as opportunities and partners rather than as problems and beneficiaries. The four domains of PYD are assets, agency, enabling environment, and contribution and engagement.

- **Narrowing**: Transparently narrowing of priorities and activities that will be conducted under the partnership. Our cross-cutting agenda, technical support, and what is expected from the partners all are discussed and a great deal of negotiation takes place before we can finalize partnership concept.

- **Polishing**: Collective refinement of prioritized ideas. We move into documentation, focusing on **milestone development/budget**. Sometimes this process of documentation can take longer than usual based on the market actor's capacity. For instance, we may need to support the firms in scoping a problem and defining the solution. (See Annex A: Project Description Template)

> **Gender, Youth, and Social Inclusion (GYSI) Considerations**
>
> - If partners are new to or hesitant about GYSI approaches, consider **starting small and piloting different activities** with women and youth. Once there is positive proof coming back from those pilots, targets can always be revisited and increased.
>
> - Go beyond focusing on setting participation or job targets and **ask partners if they have strategies/approaches to reach those targets**. This is important because otherwise partners may start implementing without real thought on how to do it.

Phase 4: Formalizing Awards or Other Agreements Once you have decided on specific partnership activities, there are different ways that you can formalize those plans. Use it as an opportunity to clearly describe intentions, ways of working, and desired outcomes. Regardless of the mechanism used, it is critically important that staff shift from a focus on transactional functions (such as the typical grant management process) to a more facilitative mindset. The goal is to collaboratively engage the partner in activities that will bring shared benefits.

- **Action Plan:** An action plan is a way to make a shared vision is made concrete. It describes the way multiple organizations will **align its efforts** to meet a shared objective. An action plan consists of several action steps or changes to be brought about collectively. Some of these actions may be done independently, some may be coordinated between the partners. Each action step or change to be sought should include the following information:

    o *What actions or changes will occur*

    o *Who will carry out these changes*

    o *By when they will take place, and for how long*

    o *What resources are needed to carry out these changes*

    o *Communication (who should know what? How often will you meet or come together to determine progress on the action plan?)*

- **Memorandum of Understanding (MOU):** a signed non-obligating and legally non-binding document that **describes the intentions and roles and responsibilities** of ACDI/VOCA (via a USAID activity) and other actors who decide to work together to address a shared development challenge. Typically, more formal coordination and resource commitment is required than what might occur in an action plan. (See Annex B: MOU Template). You will also want to conduct a due diligence on the firm before finalizing the MOU.

- **Grant Agreement:** articulates the **financial and technical resources that will be provided by ACDI/VOCA to the private sector firm** to carry out a project with desired development outcomes, the financial and in-kind investments the firm is expected to make, and other obligations of the firm in receiving this grant. Typical procurement processed will be followed in issuing the grant agreement, including the due diligence process and community consultations especially in areas that are more conflict sensitive as in the case of ACDI/VOCA Agriculture and Food Systems Development Activity in Myanmar. It is important to consider the structure of the grant agreement so that it incentivizes desired changes and assists them in developing internal structures and processes that will help them attract future financing. For example, the TMS project in Honduras recently shifted to a pay-for results-based approach which allowed it to create incentives for market actor to achieve stated outcomes and impacted staff understanding of 'the bigger picture' as well, forming a shift in results monitoring.

  - The **proposed budget** is an important indication of the partner's understanding and commitment to the co-creation process. As you review the budget, you want to make sure that your activity's financial resources aren't providing a subsidy for the firm's normal operational costs. Instead, you are looking to help offset the firm's risk in trying a new approach that will bring both development and business value. The budget should provide a clear indication of where the firm is willing to make its own substantial contributions to ensure the success of this project. You also want to assess during the negotiation process if the firm sees the value of collaborating on this activity beyond financial resources – such as the guidance, support and networks that your activity can bring them to help them do something different. Ultimately, you are **investing in the partner and their commitment and capabilities** to achieve the desired results, not just the idea they are proposing in the concept note.

  - Compared to traditional grant management roles, staff will need to rely more on relationship management skills and practices to ensure the success of these types of partnerships. See the Managing for Partnership Health guide for more insights.

- **Annual Program Statement (APS)**: An APS is an open invitation for organizations and firms to submit concept notes around a set of issues and parameters that your activity decides upon, and that may lead to a funding award. The Rice and Diversified Crops (RDC) activity in Bangladesh found that using an APS – instead of a traditional Request for Proposals (RFP) approach – helped them receive applications on a rolling basis and helped them turn around applications in a couple of weeks instead of the prior timeframe of 2-3 months. They found the quick turnaround critical given the seasonal nature of many of the value chains they are supporting.

- **Provision of Short-Term Technical Assistance:** During the co-creation process, your team may determine that the private sector firm is not ready to pursue a partnership agreement and needs additional technical assistance. ACDI/VOCA and the partner can develop a joint agreement document to describe the type and duration of STTA the activity will provide, any expectations of the private firm in receiving that assistance, and desired outcome of that assistance.

QUICK TIPS for FORMALIZING PARTNERSHIPS

Some insights from the USAID/Honduras Transforming Markets Systems activity implemented by ACDI/VOCA:

- Remember that the overall purpose of the partnership is to **create value** not a grant document
- **Not all co-creation is about funding**. There are also opportunities to provide technical assistance and use relationship building to achieve desired development and business goals.
- **Make partner engagement continuous** – build enduring relationships, iterate on approaches, and allow for fluidness
- Co-creation spans from **design to implementation to adaptation**.
- Do not overwhelm and/or **distract partner with 'process'; rather, focus on core business**.

Phase 5: Reflect Pause and Reflection is critical during and after subsequent co-creation processes. It offers both the program and the partner to reflect on what worked, what didn't and why. It is also an opportunity to explore how to get to alignment and additionality more quickly to advance inclusion outcomes as well as determining existing GSI challenges faced or lessons learned

The Agriculture and Food Systems Development Activity (AFDA) in Myanmar conducted a pause and reflect session using a participatory stakeholder exercise. Through this exercise, it was determined that many partners were still passive regarding the economic and social importance of integrating gender and youth into their business models through co-creation. Using this information, AFDA adapted it's approach to make the economic value of investment in GSI outcomes more clear through coming prepared with secondary market research and using previous partners successes in investing in inclusion as "proof points."

ACDI/VOCA also recently developed a partnership health tool consisting of GSI indicators to assess the resources, behaviors, and relationship health factors that contribute to partnership success during co-creation and implementation. For example, through looking at responsiveness, senior leadership engagement, staff transition readiness, and alignment we have already been able to modify co-creation processes, and maximize inclusion outcomes that lead to more competitive, inclusive, and resilient markets.

1. What was supposed to happen?

2. What was the reality?

3. What went well?

4. What did not go well?

5. What should be changed for next time?

6. What should stay the same or do again for the next time?

7. Are there ways that we could get to alignment and additionality more quickly/effectively?

8. What are some of your successes in engaging with women, youth, and other vulnerable groups?

9. What are some of the GYSI challenges you have faced or lessons learned?

Co-Creating to Deepen Understanding of Market Systems

Another way that co-creation happens is through bringing together a diverse group of stakeholders to better understand what is happening in a market system and then identify high-leverage opportunities for collaborative action that will make the market system more resilient, competitive, and inclusive. Similar to the co-creation approach used for partnership development, you want to be clear on the value proposition for stakeholders participating in the event. Typically, workshops are held over two to three days (or over five to six 2-hour long virtual sessions), and include the following sessions:

Introductions: Most co-creation workshops start with an introductory session that clearly communicates the workshop's objectives and agenda, and key parameters relating to process, thematic focus, and any support (financial or technical assistance) that will be available for any concepts or action plans that come out of the workshop.

Define the Problem: The next stage is generally organized around building a common understanding of the current market system. Facilitation teams will often conduct systems research and analysis prior to the workshop and present it at this stage for validation and discussion. Exercises at this stage tend to focus on identifying barriers to change, end-user/beneficiary needs and preferences, key stakeholders, and potential intervention points. The amount of time and energy you spend on this step will depend on the composition of the participant group and how common or deep their understanding is at the beginning. During the workshops, you can also incorporate brief five-minute presentations of current research findings or assessments that can further inform the participants' understanding of the market system. During this stage, the goal is to help participants collective understand the market system drawing upon their diverse perspectives, and to facilitate "sense-making" among the group so they can translate those insights into actions that will lead to broader, more systemic changes. There are many facilitation exercises that can used. One example is the **5 Whys** exercise:

Step 1: Presenting the problem/issue. Each person thinks about the core challenge they are trying to resolve, the consequences of not solving the problem and what frustrates them about the problem. Then on a sticky-note, they write the problem they are trying to solve.

Step 2: Go deep to identify the source of the problem/issue. Have a print-out of the Systems Iceberg model. Go through each of the challenges and ask, 'why is this a problem?' If the answer is another

problem, write down that problem and move it onto the most relevant level on the Systems Iceberg map. Continue to sort through the sticky-notes, placing them on a map. As new problems are identified, add a sticky note in different color. Do this until group feels it has identified the source of the problem.

Step 3: Target the source problem/issue. Put the source problem/issue in the center of a compass. Due North: indicate the 'measurable' results you want to achieve by resolving the problem. Due South: label the resources and efforts will need to address the problem/issue. Due East: indicate the barriers/constraints you will have to deal with to address the problem/issue. Due West: indicate the enablers/opportunities to help make it happen.

Brainstorm Solutions: During this part of the event, participants identify potential leverage points that would make the market system more resilient, competitive, and inclusive. The ideation process often ends with some form of idea filtering. This typically involves clustering common ideas and prioritizing them based on their popularity in the room, feasibility, and potential for impact on the problem.

Develop Action Plans: Participants then spend some time digging deeper into the priority areas and refining them into concrete Action Plans. If there are multiple groups working on different concepts, there is often a pitch or feedback session, and time built in to identify alignment across the room. This is also the stage where partnerships or coalitions and potential implementation arrangements are often set.

Facilitation Role

Facilitating the co-creation process is a critical role that ACDI/VOCA staff will play. This requires an **understanding of** the activity's objectives and what we hope to get out of the co-creation process, **build relationships and trust** with participants, and **guide collaboration** through dynamic interactions (via both workshops and meetings) over the course of the co-creation experience.

As facilitator, we play many roles:

- **Communicator**: Communication is key to effective facilitation. We need to think clearly and in language that our partners will understand. Communication is a process and is something that needs to be continuously done effectively from co-creation to partnership management.

- **Relationship Builder**: As facilitators, our goal is to build effective relationships with our partners to ensure alignment and buy-in to business and development goals.

- **Systems Analyst**: We need to continue to analyze the system in which our partners are operating. Note that sometimes these systems change (for the good or bad) based on our interventions so it's up to us to continue to make sure we are on track to influence these outcomes.

- **Coach**: We are building the capacity of our partners. This can be in both formal (i.e. building financial capacity) or informal ways (i.e. creating networks or relationships).

- **Innovator**: We need to step outside of the box and help our partners think creatively about achieving their outcomes. We operate in complex, evolving markets, so the extent to which we can help our partners respond and adapt is critical.
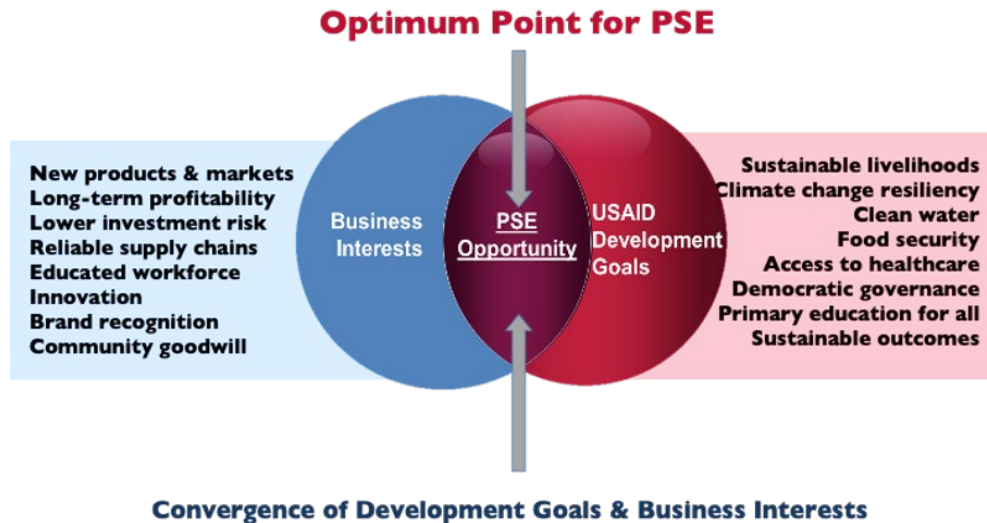
Critical Factors to Keep in Mind

- A key element of co-creation is an emphasis on **shared power**, **responsibility**, **decision-making** and **ownership** over the ultimate product.

- Focus on **open sharing of information**. Information barriers should be eliminated to a certain degree in order to gain trust from partners engaging in this process.

  o Set and clearly **communicate expectations** around funding, purpose, and the overall process.

  o Be clear about what you **can and cannot share**.

  o Ensure that **program and procurement officials** have a strong relationship and common understanding of the process, equally value the role of partnerships and collaboration, and feel comfortable with ambiguity.

  o Keep notes of every meeting and be sure to **document any key decisions**.

  o Ensure that you have the partner's **formal consent** on every document.

- Ensure a clear and compelling **value proposition** for partners participating in the co-creation process. This ensures that you can attract and maintain commitment from the right partners.

  o If there is not alignment between what potential partners are expected to give and get, this may be an indication that you have not yet identified the right partners or that you need a clearer and more compelling value-proposition to engage the desired group.

o   Seek opportunities to create **shared value** – you and the private sector firm may be coming at this from different incentives and value propositions. The reasons why we engage likely won't be the same, but we should have similar goals and opportunities in mind to create value.

Optimum Point for PSE

New products & markets
Long-term profitability
Lower investment risk
Reliable supply chains
Educated workforce
Innovation
Brand recognition
Community goodwill

Business Interests

PSE Opportunity

USAID Development Goals

Sustainable livelihoods
Climate change resiliency
Clean water
Food security
Access to healthcare
Democratic governance
Primary education for all
Sustainable outcomes

Convergence of Development Goals & Business Interests

- Be aware of the **tone** you are setting during the co-creation process. You want to strive to create a **positive and open environment** that will bring out the best ideas from potential partners and foster their long-term commitment to work on this issue. Knowledge is important, and we want to learn more from the partner how their business works, challenges, and opportunities for growth. We should always approach our questioning with the attitude of deepening our understanding and leaving them with a sense that we care about their interests, too. Inquire, don't interrogate!

    o   **Sequence questions based on maturity of relationship**: During the early stages of the relationship, refrain from asking too many questions that are sensitive (such as profit margins) or may overwhelm them.

    o   **Phrase questions in a 'How' format**: Focus on asking 'how' questions instead of 'why'. For instance: instead of asking 'why did your company's sales drop?' ask 'how did you respond to the decline in sales last year?'

    o   **Moderate discussion with a clear agenda:** A clear agenda of meetings will be helpful, and also try to ensure that every meeting is documented, and key decision points captured for future reference. Build in time for developing a rapport with the partner through personal connections and informal interactions. This benefits co-creation by helping build trust. And be sure to take breaks during lengthier meetings!

    o   **Use more private sector friendly language**: Another important point is to use more business-friendly terms instead of market systems development (MSD) terms and jargon. If

the partner doesn't seem to understand 'systemic constraint', then start asking about the challenges faced by the business, the farmers, and the sector.

- **Communication** is crucial during the entire co-creation process to make sure everyone is on the same page and feels meaningful engaged.

  - **Set clear objectives and carry this into the solicitation and selection criteria**: In cases when firms are invited to a co-creation workshop on the basis of an Expression of Interest (EOI), there is likely to be confusion about whether we want them to further develop this concept or use this idea only as a general starting point to collaborate on something new. Try to tailor the announcement and expectations for the EOI to reflect your decision, and state clearly ahead of time what relevance the EOI responses will have on the work being done in the workshop.

  - **Communicate clearly and transparently with participants about the co-creation process.** The workshop agenda and facilitator(s) should devote time at the start of the workshop to state the desired objective, the desired or anticipated dynamics among participants, and our plan for next steps after the co-creation workshop. The agenda should allow time for firms to ask questions about the process or state any frustrations they may be feeling. It is also helpful to acknowledge openly that the process is likely to feel unfamiliar or uncomfortable at times, and to ask for some patience and trust from firms as you work together toward your objectives.

  - **It helps to set expectations and be clear about the process even before participants set foot in the workshop**. By offering pre-workshop calls that outline the objectives of the workshop and the
    relationship between the firm's submitted EOI and the work being done in the workshop, you can allow time for their questions and concerns.

  - **Co-creation workshops are often ripe with uncertainty but being flexible about how you get to the objective can yield unexpected and powerful collaborations.** Willingness and ability to adapt your co-creation agenda and activities based on what is and is not working is essential. Keep an open mind throughout the process and allow others to challenge your assumptions. We have observed that co-creation workshops result in better and more creative outcomes if program teams, even if they have in mind particular solutions they hoped to find and fund, remain flexible and provide latitude to firms to pursue ideas that excited them even if it diverged from our initial expectations. At the same time, take care not to deviate so far from your original plan that you do not achieve your intended objective(s) or make the process feel chaotic.

  - **Delays**: If you are experiencing delays on the ACDI/VOCA side in moving the co-creation process forward, make sure the co-creation leads give courtesy calls to the firms involved in the process to keep the communication channel active. If delays are from firms' end, try to understand why and see if there are ways we can provide support in minimizing that delay. This is a small way to demonstrate how we can add value to the partnerships.

- **Rejections**: This is going to be the hardest part. Make sure to include in your communication to them where they could make improvements on their business proposal for the next time. You can also point them to other resources that they can take advantage of to help strengthen their business model. They will continue to operate in that country, so we want to ensure we continue to have a positive relationship with the firm.

Insights from the Field

The **Agriculture and Food Systems Development Activity** (AFDA) is a market systems project implemented by ACDI/VOCA in Myanmar. The project uses a co-creation process to incentivize and build the capacity of the private sector who have the resources and are willing to co-invest in strengthening agriculture market systems in the AFDA's zone of influence (ZOI).

Through two rounds of co-creation, the project has learned a lot about how to engage with the partners effectively through co-creation.

- **Scoping the problem**: Rather than coming into the co-creation process with pre-designed ideas, the team instead presented an issue/challenge identified in the market and asked the private sector actor what they thought. This allowed the AFDA team to approach co-creation with the private sector actors in the "driver's seat" and create an environment of mutual trust, accountability, as well as stronger and more aligned ideas. By asking the questions "what is the problem we are trying to solve," they were able to address a fundamental constraint in a more coherent way.

- **Identifying alignment and additionality early on**: One of the most critical challenges AFDA was facing was ensuring there was alignment between private sector partners and their desire to achieve development impact through AFDA's support. Additionally, the project struggled to answer the questions, "how is our support helping this private sector company do/achieve something it would otherwise not be able to achieve on its own." Whenever the project got stuck on a particular concept/idea, we would take a step back and continue to ask ourselves some key questions:
  - *How has the firms existing response supported/weakened the market system?*
  - *What is the incentive for this private sector company to achieve this goal?*
  - *What value does AFDA bring to this partnership? What is the private sector companies' interest in having AFDA play this role?*

- **Looking at the bigger picture**: It can be difficult to shift focus from a one-off transactional partnership to a portfolio of transformational partnerships that align with a project's systemic change objective. Through the second round of co-creation, the team hosted a series of pause and reflect sessions to encourage learning and adaptation. The project also analyzed where the investments were happening and where additional investments needed to be made.

AFDA was in co-creation process with a company looking to expand its avocado production and processing to become the first commercial avocado oil producer exporter in Myanmar. Early on, it became clear that although strategic alignment existed, there were questions regarding why such a well-resourced company needed AFDA's support.

Since AFDA was unable to support ongoing operational expenses and previously purchased equipment due to USAID restrictions, AFDA worked with the company to identify other areas where it could add value that would result in tangible business and development impact. The project made the following shifts during the co-creation process:

- **Demonstrated the role of technical assistance in strengthening supply chain operations**. The private sector company brought a lot of the technical resources to the table and was reluctant at first to expand. However, AFDA helped the company think about other potential areas to source its avocado, and this became one of the focal points of the partnership that would directly impact production and sales.
- **Focused on how our support could help the company attract more financing to increase their sourcing and value adding processing activities**. Instead of potentially distorting the market or supporting redundant costs, the project tapped into its network and demonstrated how we could bring credibility and brand reputation to the company that could result in additional financing secured.
- **Captured the potential for creating systemic change in the avocado market system**. Although the direct development impact over a two-year period was not large, there was a lot of potential in terms of transforming the way the avocado system operates, creating opportunities for value added processing and upgrading production standards. This has strong potential to crowd-in support service providers, input suppliers, and other buyers into the market.

Although it's too early to see the impact of this investment, early signs indicate transformation in the avocado market will soon happen.

Additional Resources

- USAID Co-Creation Guide

- Blog series about how USAID/Mexico conducted a co-creation workshop virtually

- USAID Marketlinks Seminar: Realities of Co-Creating with the Private Sector. (Slide presentation here)

- Market Actor Partnership Agreement Gender Review Checklist

- Tool for Assessing Motivations of Private Sector Partners to Work with Women as Suppliers, Employees, and Consumers

Annex 1: Proactive Market Risk Mitigation Measures

PSE interventions may lead to negative market distortions such as reinforcing the market power of targeted companies at the expense of other firms, raising barriers to market entry, and reinforcing information asymmetries. This list of market risk mitigation measures is based on USAID's PSE risk mitigation framework and should be integrated within co-creation processes. At a high level, it is important to balance your portfolio, so that you are not just working with lead/anchor firms, but providing avenues of support for new entrants or smaller firms. Additionally, consider components that address the business enabling environment to level the playing field.

Proactive Market Risk Mitigation Measures

#1. As part of **selection** of the partner, ensure that competitors of selected companies were *aware of* and had *access to* apply.

#2. In **due diligence** identify the list names of competitors with technical liaison and assess the competitive context with respect to proposed activities.

#3. Provide **flexible requirements** on leverage and dedicate percentage of funding for disadvantaged enterprises in components e.g. smaller, etc.

#4. Monitor for *anti-competitive advantages, barriers to entry and information asymmetries* through annual evaluation of activities.

#5. Fund the development of publicly-available, detailed *business case* and *practical how-to* around innovations, demonstrated through partners.

#6. **Step-out of direct private sector partnerships** as soon as feasible, to minimize impact of distortion of the market (then do system-level actions).

Annex A: Project Description Template

1. PROJECT OVERVIEW

Project Name:	
Project Location:	*Where the activities will be implemented*
Project Proponent:	*Name of the legal entity (can be an enterprise, association, NGO, etc.)*
Main contact:	*Point of Contact from the proponent's side to include name, position in the company/organization, phone and email*
Grant amount:	*In USD as approved by COP or by A/V HQ*
Proponent's leverage contribution:	*In US$*
Project duration:	

2. ABOUT THE COMPANY / ORGANIZATION

NAME	*As listed in formal registration*	
LEGAL FORM	*single proprietorship, LLC, etc*	
OWNER:	Name:	Sex:
MANAGER:	Name:	Sex:
ADDRESS:	*Main company address*	
EMAIL	*(of owner or manager)*	
PHONE	*(of owner or manager)*	
NAME / POSITIONS of ANY OFFICERS		
YEAR ESTABLISHED		

Employees

Number of	Employees total	
Number of	Male employees	
Number of	Female employees	
Number of	employees aged 15-29	

Sales turnover in US$ (last 3 years)

	Year	Sales (US$)
1	2018	
2	2019	
3	2020	

Top three markets/buyers and value of sales:

	Buyer/Markets	Sales (US$)
1		
2		
3		

Trademark/brand (if any)

Example:

3. PROJECT GOAL, BACKGROUND AND SPECIFIC OBJECTIVES

Goal: *(high level summary of what the project is about and what it aims to achieve)*

Background and specific objectives
- This section discusses the constraints to and opportunities for growth that justifies investment in this project.

In summary the specific objectives are:

4. OVERALL STRATEGY

This section discusses the different actions that the company plans to take to ensure success of the project. For example:

- *Marketing*
- *Processing*
- *Supply Chain*
- *Inclusion Strategy*
- *Organizational Capacity*
- *Risk Management*
  - **Financial –**
  - **Market Competition**
  - **Supply Chain**
  - **Environmental – potential hazard - mitigation plan**

5. ACTIVITIES, TIMELINES, DELIVERABLES AND SCHEDULE OF GRANT DISBURSEMENT

No.	Activity Description	Deliverables	Date due	Grant (US$)
1				
2				
3				
4				
5				
6				
7				
8				

6. CONTRIBUTION TO INDICATOR TARGETS

	Indicator	Year 1	Year 2	Year 3	Year 4	Total
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

Annex B: MoU Template

Memorandum of Understanding Between ACDI/VOCA [Country Office] and [Name of counterpart Company]

This Memorandum of Understanding (MoU) for mutual cooperation is made and entered into on [DATE], between **ACDI/VOCA through its [Country] office under the [donor name] [project name],** located in [insert address] and name of [counterparty]**,** located in [insert address].

Preamble
WHEREAS ACDI/VOCA and XXX have mutual interest in the objectives and intended outcomes of the xxx project.

WHEREAS ACDI/VOCA and XXX have access to different networks of beneficiaries and/or organizations and to different technical and financial resources; Partners agree, under the framework of this MoU, to continue to expand the existing partnership through a variety of mechanisms outlined in the terms and conditions set forth below.

Background
The purpose of the USAID funded xxx program is to xxx.

- Outcome 1: xxxx
- Outcome 2: xxxx
- Outcome 3: xxxx

Partner description *to be inserted* here.

Objective/Purpose of MOU

The Partners share the following objectives:

To be inserted

The Partners also agree to collaborate on (suggest included bullets below):
- Ensuring women and men are provided with equal opportunity to get engaged in activities under this partnership.
- Optimization of opportunities for participation of youth and individuals of different ethnicities in this partnership.
- Ensuring partnership activities do no harm to the environment or the community, or cause conflict among members of the community.

Terms of Reference (TOR)
The Partners are committed to cooperate to implement the project and achieve targets indicated below. *To be specified based on the proposed objectives for each partnership.*

ACDI/VOCA's responsibilities under this partnership will include:
To be inserted

1.

2.

3.

Name of partner's responsibilities under this partnership will include:

1.

2.

3.

Partnership Implementation, Collaboration, Learning, and Adaptation

ACDI/VOCA's XXX project and XXX will identify in writing (by email) Partnership Managers, who will serve as their respective Point-of-Contact (POCs). The Partnership Managers will be responsible for the collaborative implementation and monitoring of the Partnership.

Partners agree to co-brand activities/items within the scope of this partnership as identified in the TOR and the attachments.

Partners agree to meet at least once every quarter at a mutually agreed date to review implementation of the Partnership. Learnings will be documented and shared between ACDI/VOCA and XXX.

This MOU may be amended to adapt to changes in situation or based on learnings from the implementation of the partnership. Modifications will take effect upon agreement of the Partners in writing.

Effective Date, Duration, Amendments, and Termination

This MOU becomes effective upon signing by both Parties. It is expected to run from *insert date* through *insert date*. In addition, this MOU may be modified or amended if the Parties agree in writing. Any Party may terminate this MOU at any time, however should endeavor to provide at least 30 days' written notice to the other Party.

Independent Contractors

The relationship of the parties established by this Agreement is that of independent contractors, and nothing contained in this Agreement should be construed to give either party the power to act as an agent or direct or control the day-to-day activities of the other. Financial and other obligations associated with each party's business are the sole responsibility of that party.

External Communications

XXXX. shall not use the name of ACDI/VOCA, USAID, the xxx project or any of its partners in any promotional literature or information without the prior written approval of ACDI/VOCA.

Confidentiality

It is understood that all information gathered under this understanding, all reports other than those required as part of ACDI/VOCA's reporting process to the client and or other donor with whom ACDI/VOCA receives funds to ensure the success of above referenced activity, shall be treated as such.

Legal Effect

This MOU shall not be either legally binding on any party to this MOU or be deemed to constitute an obligation or commitment of funds by any party. This MOU, nevertheless, reflects the present intention of each party to purse and implement in good faith the understanding described herein. The parties may negotiate mutually acceptable separate agreements as they may deem advisable from time to time to guide the administration of any joint properties that might arise out of this MOU.

Best Effort

Each party shall exert its best effort toward successful performance of the work contemplated in this MOU and shall provide appropriate, highly qualified and performance-minded managerial and technical personnel to perform and support this initiative.

Assignability

Neither Part may assign its right, duties, or obligations under this Agreement without the other's   prior written consent. This Agreement will bind and inure to the benefit of each party and their successors and permitted assigns. Any attempted assignment of this Agreement in violation of this clause is void.

Notices

Any notice required or permitted to be given in accordance with this Agreement will be effective if it is in writing and sent by certified or registered mail, or insured courier, return receipt requested, to the appropriate party at the address set forth below:

> *If to ACDI/VOCA*:   [Address]
> > Attention: [●]

> *Counterparty:*   [Address]
> > Attention: [●]
> > .

Dispute Resolution

The Parties hereby agree that, in the event of any dispute between the Parties relating to this agreement, the Parties shall resolve the dispute through informal discussions or terminate the MOU.

Relationship of Parties

The parties shall act as independent entities in the implementation of this MOU. Nothing contained herein is intended to or shall create the relationship of employer-employee, joint venture, or principal-agency between the parties, nor does the MOU establish a legal entity.

Each party shall be solely responsible for its own expenses related to the undertakings contemplated herein, except where funding for specific activities have been assigned to one party, or divided between two parties, and agreed to in advance (i.e. training sessions)

No party has the authority, express or implied, to create financial obligations on behalf of the other party, to create commitment other than as contained herein, or to take any positions on behalf of the other party without other party's written consent.

Legal Effect

This MOU shall not be either legally binding on any party to this MOU or be deemed to constitute an obligation or commitment of funds by any party. This MOU, nevertheless, reflects the present intention of each party to purse and implement in good faith the understanding described herein. The parties may negotiate mutually acceptable separate agreements as they may deem advisable from time to time to guide the administration of any joint properties that might arise out of this MOU

IN WITNESS WHEREOF, the Partners, each acting through their duly authorized representatives, have agreed to the provisions of this MOU and that this MOU be signed in their names and delivered as of this *insert date* day of *insert month*, *insert year*.

On Behalf of ACDI VOCA	On Behalf of name of company
By:	By:
Name:	Name:
Title: **Chief of Party**	Title:
Date:	Date:

Annex C: Pause and Reflect Agenda

Facilitating a Pause and Reflect (P&R): Tips For Success
Key elements of successfully facilitating a P&R include:

Establish the purpose. What are we coming together to P&R about? Why is this relevant/important? What types of specific decisions are we hoping this will inform? This helps keep the discussions focused and actionable and is worth coming back to if things start to get off track.

- ✓ At least two business days in advance of the meeting, **send an email** with the purpose and core topics of discussion, so participants have an opportunity to reflect in advance and be prepared. (Although accept that most will not do so).

Preparation and planning can 'make or break' a P&R. The point of a P&R is to learn and adapt, so the facilitator should fine tune questions to get out of it what the participants need, which may require some advance conversations to refine.

- ✓ **Meet with the MEL Team to review** performance results in advance and come prepared with evidence to inform the discussion. Use visuals where possible. For example, sharing out the results from a training in advance can help shape the focus of questioning and be a launch point for diverse perspectives on why that result happened. "Participants capacity increased in all but Area Y and Z, why do we think that might be? What could we do differently?"   "Results exceeded our expectations, what do we think were critical elements of success?"
- ✓ **Create a tailored set of core questions, and prep follow up probes for "why" and "how"**. General questions are likely to produce general responses.
- ✓ **Set loose time limits for each set of questions** so you can be realistic about getting to the priorities and not rush conversations. Do not cram too much into one meeting. If it's getting busy – schedule two meetings.
- ✓ Consider preparing to use **participatory techniques** to get insight from a lot of people at once in a time efficient way– such as Jamboard or quick poll (for virtual meetings) or a sticky wall (for in person).

Skillful questioning is critical. As facilitator, find the balance between open ended and directive questions; ensure that participants do not think there is a "right" or "wrong" answer. The suggested questions in the next section aim to help. As the facilitator, you will need to find the balance between steering the discussion and asking prompts that draw out deeper insights and encourage application of insights to practice – while also letting others speak freely. The meeting is an opportunity primarily to listen to others – not share your own opinion or perspective. You may want to close the meeting sharing back what you heard to ensure you captured it right - "I heard you say XYZ… is that right?"

Diverse perspectives. Let people talk – and be aware who is talking and who is not. Call out people who have been quiet. Disagreements are welcome. Welcome diversity of opinions and perspectives and validate that with statements like "I appreciate your perspective." Or "I am glad you brought this aspect out."

Post P&R To Dos. Follow up is critical. This could include:

- ✓ Within one-week, Technical Liaison sends **follow up email** to thank participants, and include bullets of any key decisions agreed or action items that stem from learning.
- ✓ The Technical Liaison may want to schedule **follow up discussions with staff** to 'dive deeper' into insights from the partner P&R, brainstorm implications, and make adaptations to the project strategy, intervention designs, partnership portfolio, partner subawards, other practices.
- ✓ Technical Liaison **submits P&R notes** to Learning Director within two weeks. Include bullet list of key insights/lessons learned from discussion and priority next steps/action items with person responsible. If any pivots were identified, discuss with appropriate project manager.
- ✓ At next engagement with partner, Technical Liaison **follows up on action items** to get a status update and support the partner to apply learnings.

Start Up P&R

Category: Alignment of Vision	
Core Question	**Considerations**
1. At the end of this, what does success look like to you? 2. What are some key points in this partnership when we should know if we are on this path? - *Prompt: can we make some commitments now to come back together at these points to pause and reflect? Are there internal processes for pause and reflecting in your business/institution already that we can build on?*	Asking about one's vision of success encourages people to articulate in their own words what they want/need out of the partnership at the end and allows participants to move away from the pre-defined outputs or results a (set up a supply chain) and talk. Let the partner go first, and ask at least two people – the core technical point of contact responsible for activities, and the Partner's senior manager (e.g. the CEO, the President, etc). Look for alignment and shared value. If this does not match what is in the award agreement – discuss alignment issues. Consider also hypothesizing what success looks like for a Beneficiary.
Category: Learning	
Core Question	**Considerations**
3. What do you hope to learn through this partnership? - *Prompt: why is this important to you? Do we have the processes (including the projects P&Rs and business processes run independent of project support) and metrics/data in place to help you do that? How can we as the donor support you in this learning process?*	Aim to connect the learning to the vision of success. Prompt for diverse perspectives – different participants may need to learn different things based on their role/function.
Category: Award Mechanics & Relationship Management	
Core Question	**Considerations**
4. What are communication platforms (call, an email) and styles that work best for you? 5. Are there any questions on the award? Should we schedule a follow up for a deeper dive? Are POCs clear?	Discuss each party's communication style and preferred frequency. Review the role of the projects Technical Liaison – a mix of management, STTA, sounding board for problem solving, etc. Consider M&E, payment timeliness, clarity in understanding terms and conditions of contract, etc.

Mid-point P&R(s) *(longer or more complex partnerships will have multiple 'mid-point' P&Rs)*

Category: Overall Performance Check	
Core Question	**Considerations**
1. This is what we hoped to accomplish with this partnership: (*pull purpose statement from FAS, perhaps draw on the 'vision of success' articulated at the start of the partnership*). How do you feel we are doing in reaching this goal - are we on the right track? - *If no, probe for why – such as What has driven us off track? When do you think we got off track? What can you do, what can the project do, to get us back on track?*	With this question, you are trying to get away from the results, and instead get to the point of the partnership all together, e.g. 'expand supply chain sourcing models to diversify risks and help us break into a more competitive market for xyz commodity. If no, try and agree on at least one immediate, short-term actions to set you down a path of action.
2. Indicators don't tell the whole story, but lets recap some results so far, against our targets. Is anything surprising? - *Tailor 1-2 additional questions here based on any pain points from data analysis (see considerations).* 3. Do you think we are capturing the right results? Are there any major categories of impact we are missing?	Get a debrief from MEL before, and explore insights from factors e.g.: o disaggregated results (e.g. by geographic area, market segment, gender/youth, etc) o relational data (e.g. are outputs leading to outcomes as expected?) o pace of results over time Ask MEL to provide data visuals. Don't turn this into an in-depth results review – focus on only major points, with background data on hand to pull it up if need be.
Category: Technical Implementation	
4. In looking at the activities in this partnership, what is going really well? - *Probe - why? (This is as important to know and understand as when something is not working.)* 5. In looking at the activities in this partnership, what is causing some headaches, or concern? - *Probe - why? Consider aspects internal to the partnership or partner (e.g. processes, people, failed design assumptions) but also external ones (market trends, other actors).*	Based on the partnership, you may want to separate this into several sub-categories based on activity components, and then come back together to look at things overall. Keep an ear out for examples of change in what is going well and what is going wrong and the responses to that. In particular, what is the partner doing and how can we support them (not, what can the project do to fix it). Nudge partners to think about areas of concern for them in achieving their technical objectives. There may also be partner communication/ FAS administrative issues to discuss, but save that for later if possible, and keep this technical.

- *Probe – what has your response been? What can we do to support your response?* 6. Is there anything we can do to help amplify the scale of your results? - *Probe for collaborations with other partners, opportunities to share learning or impact with other networks using media or stakeholder forums, and technical adjustments to the partnership itself*	Use participatory techniques – e.g. round robin sharing (eg. each person has 1 minute to contribute to an insight and then facilitator draws out trends; Jamboard, stickies, voting)

Category: Learning & Adaptation

7. What is the biggest thing you have learned so far from your activities this past period?
   - *Probe – how did you learn it? (e.g. what happened to make you realize this?) Do we need to invest more or less in this process/source of learning? How does this learning impact your day to day work in the next month? Does this challenge how we designed this activity, and if so, how do we need to pivot? What critical information do we still need?*
 	
8. Have we made any major adjustments or shifts in the past period?
   - *Probe for specific examples big (e.g. we have decided to break into a new market segment) and small (e.g. we changed how we recruited agents to improve applicants with skill xyz). Describe the changes. Why did you decide to make the shift? Is it having any positive results yet?*
	Getting partners to reflect about what they learned may take some effort. If it stalls, come to the discussion with a prompt to get them thinking based on what you yourself have observed. E.g. – insights that may have come from tapping a new market, or trying out a business model or sourcing strategy, what it takes to work with new collaborators, how they compare to competitors in terms of price/products/management processes/IT systems/etc. You could even recall as far back as the co-creation process and any learning questions that fed into that evolution.

Category: Inclusion

9. Talk to me about how women/youth/those prone to migrate/etc are doing compared to others in the portfolio.	Tailor based on relevancy of partnership to gender, youth, migrants, other marginalized group goals.

Category: Relationship Management and Award Mechanics

10. Is there anything I can do as your Technical Liaison to enhance our working relationship? - *Probe for communication style, technical support, frequency, type of feedback, etc*	Before hand, get debrief on timeliness and quality of data reporting and milestone completion, and payments from the project.

11. Are there any major award administration issues we should discuss?	
Category: Looking Forward	
Recap any major commitments or action items agreed to during the P&R. Promise a follow up email to summarize major takeaways. Thank participants for openness and willingness to be flexible, think critically, and iterate the partnership for maximum success for both parties.	

End of project P&R

Category: Overall Performance Check	
Core Question	**Considerations**
1. Lets recap what we hoped to accomplish, at the start, with this partnership. Do you feel we did this? - *Probe why or why not?*	

2. Indicators don't tell the whole story, but lets recap the results, against our targets. Is anything surprising?
- *Tailor 1-2 additional questions here based on any pain points from data analysis (see considerations).*
- *Probe: Looking back, is there anything we could have done to the scale or sustainability of results more? Is there anything we can do going forward? Probe for collaborations with other partners, opportunities to share learning or impact with other networks using media or stakeholder forums, and technical adjustments by the partner*
	Get a debrief from MEL before, and explore insights from factors e.g.:
	  o disaggregated results (e.g. by geographic area, market segment, gender/youth, etc)
	  o relational data (e.g. are outputs leading to outcomes as expected?)
	  o pace of results over time
	
	Ask MEL to provide data visuals.
	
	Don't turn this into an in-depth results review – focus on only major points, with background data on hand to pull it up if need be.

3. One year from now, what do you think the story from this partnership will be? - *Prompt: Do you think we captured the right results? Are there any major categories of impact we missed?*	
Category: Learning & Adaptation	
Core Question	**Considerations**
6. Lets map the story of learning and changes over the life of this partnership. Looking back, what were the biggest 'aha!' / lightbulb moments for you? - *Prompts include: when we first came together to co-create he partnership, what were the steps in the process we thought would get us to our goal? Who did we think we needed to involve? When did we think we'd see results? Did that play out? Why or why not? Would you design this the same / phase activities this way the next time?*	Be sure to prompt for diverse perspectives – different participants likely learned different things based on their role/function, and their 'piece of the pie' will be important to get a complete picture. Consider using sticky notes (in-person or with virtual tools like Jamboard) and asking people to write out the top 2-3 moments where learning or change happened. Let people make this personal to their perspective.
7. One aim was to evolve as we went along – to pivot in response to changing dynamics in the marketplace or learning from	

implementation. How well do you think we did that?
- *Prompt – how confident do you feel to continue this going forward? What processes will help you do this? Is there someone responsible for managing that?*

8. Going forward, what are some questions you still need to test out?
- *Prompt: what do you need to do that? Who is critical to this process?*

Category: Technical Implementation	
4. In looking at the activities in this partnership, what do you think went really well? - *Probe - why? (This is as important to know and understand as when something is not working.)* 5. In looking at the activities in this partnership, what caused the biggest headaches or concern? - *Probe - why? Consider aspects internal to the partnership or partner (e.g. processes, people, failed design assumptions) but also external ones (market trends, other actors).* - *Probe – what was your response? What could we have done better to support your response?*	Based on the partnership, you may want to separate this into several sub-categories based on activity components, and then come back together to look at things overall. Keep an ear out for examples of change in what went well and what went wrong and the responses to that. In particular, what did the partner do and how could we support them (not, what can the project do to fix it). Nudge partners to think about areas of concern for them in achieving their technical objectives.