

Quarterly Strategic Review - Concept Note (v4)

The Quarterly Strategic Review (QSR) is a meeting held every three months. This takes place over two days to assess achievements/progress towards market system change at the **sector level**, as well as to plan significant programme-level events (e.g. capacity development, new portfolio development, monitoring and results measurement activities).

All Sector Analysts, Senior Sector Analysts, the Results Measurement (RM) Team and the Samarth-NMDP Management Team, including the Project Manager, will attend the review meeting to discuss more specific technical matters relating to systemic change at the sector level.

The QSR differs from the regular fortnightly and monthly Portfolio Meeting. It focuses on change at the sector level, rather than at the level of individual interventions.

1. Purpose of the QSR

The QSR, along with the fortnightly and monthly portfolio meetings, is a critical tool for Samarth-NMDP to share knowledge and promote learning across Samarth-NMDP projects. In this role it serves the following three purposes:

1. Discuss and review progress towards **stimulating market system change** over the past three months. On the basis of this discussion reassess the sector strategy and design and identify potential adjustments – and whether new interventions need to be introduced, modified or on going interventions dropped, or results chains adjusted¹.
2. Identify the **key questions** for investigation over the next three months and beyond, and develop a plan to answer them.
3. Reflect on **successes and failures**, and capture relevant learning.

1.1 Discuss and review progress towards market system change

During the QSR, Samarth-NMDP will review progress towards achieving systemic change for each current sector. As part of this discussion, Sector Analysts will share their observations on the status of the sector; factors related to the sector and in the broader environment that have affected implementation and results; and the expected course of progress over the coming three months and beyond. Progress towards systemic change is captured through the 'adopt-adapt-expand-respond' matrix and corresponding indicators laid out in each Intervention Guide. Progress should also take into account risk factors, as captured in each Sector Guide (including the risks of 'doing harm').

In preparation for the QSR and during the QSR discussion, participants will focus on the following three key questions:

- What have we observed in terms of changes in the market systems – and what evidence has been collected? Are we still on course toward achieving the intended systemic change? If not, how have we deviated and why?
- Is our market analysis and strategy underlying the intervention design still valid?
- What adjustments do we need to make to the sub-sector strategy and design?

To arrive at answers, the QSR discussion will consider a number of discussion points covering the following topics:

1. Market dynamics,
2. Sector design and strategy
3. Leverage and other signs of systemic change,
4. Cross-cutting issues, and
5. Lessons learned.

¹Tools for measuring market system change are outlined in Chapter 13 of the Results Management System User Manual

The specific discussion points covered during any QSR is left up to the discretion of the Samarth-NMPD Management. In covering the discussion points during the Sector Analysts will draw heavily on tacit knowledge (captured in Intervention Guides) or formal results measurement processes (e.g. surveys) and results of their scanning activities. It is expected that all meeting attendees will participate actively in the discussion. Questions that might be addressed in these discussion points are listed below:

Market Dynamics

- Were our initial analysis and assumptions about the market correct?
- Have changes occurred in the broader market and other (e.g., political, social, natural) environments that call our initial analysis and assumptions into question?
- What factors in the broader market and other environments have affected, or may affect, intervention implementation and results and how?

Sector Design and Strategy

- Are the sector objectives still achievable?
- Can we achieve the intended systemic change with our existing activities?
- Are new or different interventions needed? Is the results chain for each intervention still valid?

Leverage and other evidence of systemic change

- Are there market actors willing and able to work with us? If yes, what are the signs that they are opening up to attitude/behaviour changes? How does this relate to results as set out in results chains? Are change intended/unintended?
- Towards '**adopting**': what are the signs that this innovation is viable, has an appropriate division of labour (between the programme and market players); and that there is pro-poor satisfaction with the new product/service?
- Towards '**adapting**': what are the signs that further investments and improvements are being made by the market players; that the innovation been mainstreamed in business practices; and that the pro-poor benefit flow remains?
- Towards '**expanding**': what are the signs that original investment has been rolled-out; that new players are crowding-in; that scale agents are on-board; that the market is becoming more competitive?
- Towards '**responding**': what are the signs that the market is becoming more resilient to shocks; that a range of market players are re-configuring their own roles and responsibilities?

Crosscutting Issues

- How have sector designs incorporated issues of gender and social inclusion? How is the economic advancement of disadvantaged groups likely to be furthered with the systemic change envisioned/achieved?
- What can be done to better integrate gender and social inclusion issues into sub-sector strategy and design?
- What issues related to gender and social inclusion arose during the past three months?
- Have the risks of 'doing harm' changed in terms of market displacement, gender and social inclusion.

Lessons Learned

- What lessons can we take from the past three months and what are their implications for intervention strategy, design, implementation, and results?
- Can these lessons be applied to other Samarth-NMDP sectors/interventions?

1.2 Identify key questions and develop plan to answer them.

The QSR discussion is bound to raise a number of questions related to the discussion points or to other issues. Several of these questions will have significant implications for each sector. The QSR also requires Sector Analysts to identify questions and to develop a plan to answer them. Some questions will require follow-up by the Results Measurement Team, or more generally through monitoring and results measurement activities, and will be incorporated into updates of the Intervention Guide.

Sector Analysts will document the questions and propose a plan to answer them. The plan may be agreed upon and finalized during the QSR, or it may require further development after the QSR, particularly if it involves additional research by the Sector Analysts.

1.3 Reflect on successes and failures, and capture relevant learning

The QSR discussion should also involve an honest and open discussion around what is working, and what is not, in terms of sector strategy and implementation. This may be in reference to specific facilitation tactics being used, partner relations, pro-poor impact etc.

To generate a culture where failure is learned from, rather than hidden away, each Sector Analyst will be encouraged to present an example of an activity that didn't go to plan, and lessons for future improvement. Each Sector Analyst will therefore be encouraged to present one 'success' and one 'failure' over the past three months. These will be discussed to extract key learning which will be shared across project teams to ensure that 'failures' are learned from and 'successes' built on.

2. Three-month Review Process

2.1 Frequency

QSRs will be held at approximately three-month intervals. It is crucial to note that the QSR is a core program management function as well as a core component of the Samarth-NMDP results management system. It is not an optional meeting that is done if time and circumstances allow but rather a required meeting that is to be held every three-months and attended by all members of the core team.

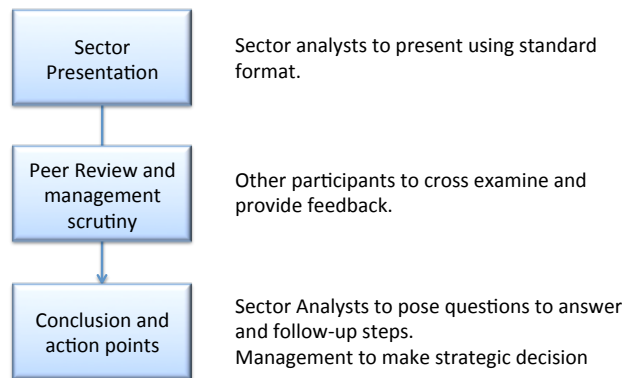
The cycle is as follows:

<u>Quarter</u>	<u>QSR date</u>
Q1 Apr - Jun	QSR 1 July
Q2 Jul - Sep	QSR 2 October
Q3 Oct - Dec	QSR 3 January
Q4 Jan - Mar	QSR 4 April

The quarters are the same as for the Programme year which is April to March.

2.2 Structure and Agenda

The QSR will spend a full day for each portfolio, Crops, Livestock and Tourism/Media. Sector Analysts will present a review of systemic change in their sectors. All reviews will be cross-examined by peers, senior sector analysts and managers to validate course of action and changes (if any). The structure for each sector discussion will be as follows:



Sector Analysts will lead these discussions for each of the ongoing sectors. This should be an opportunity to take an overall view on sectors so that strategic decision-making can be done to keep interventions on track, or change direction where implementation could work better. Discussions will also incorporate failure reporting. Sector Analysts will be encouraged to do this, as it is important that Samarth-NMDP innovates and takes calculated risks.

3. Roles and Responsibilities

Participants in the QSR include the entire Samarth-NMDP core team; Project Manager, Portfolio Managers, Results Measurement Manager, Senior Sector Analysts, Gender and Social Inclusion Analyst, Sector Analysts, Communications Manager, Stakeholder Engagement Manager, Results Measurement Analyst and Sector Advisors. The Portfolio Manager is responsible for coordinating the QSR and for appointing the Checklist Facilitator and Reporter for each QSR meeting in coordination with Results Measurement Manager.

Checklist Facilitator

Prior to the QSR meeting, the Checklist Facilitator is responsible for scheduling the meeting, identifying the discussion points to be covered in the meeting, and assigning Sector Analysts to research the discussion points and present their findings at the meeting. During the QSR meeting, the Checklist Facilitator is responsible for ensuring that;

- (1) The relevant discussion points are covered in adequate depth, and
- (2) Key questions are identified and a plan for answering them is developed and agreed.

Stakeholder Engagement Manager will be appointed the Checklist Facilitator. This role will be responsible for ensuring all discussions around new questions about sectors stay on track and will be answered effectively. This requires all Sector Analysts to submit their presentation and questions for discussions, 5 days in advance of the QSR.

Recording the QSR

The Reporter is responsible for helping the Checklist Facilitator prepare for and facilitate the QSR meeting and for documenting the discussion and conclusions during the QSR and preparing the QSR report. One Sector Analyst will be appointed, in advance of the meeting, as a Reporter to record the proceedings. The task of the Reporter is to record key points and decisions made during the meeting, but not expected to write detailed notes of all that is discussed. The Reporter will follow a template for recording the meeting.

Sector Analysts

Sector Analysts are responsible for updating their respective Intervention Guides and Sector Guides in advance of the QSR, and coordinating with the rest of the technical teams to take follow-up action with regards to the sector or intervention strategy where necessary². The Results Management System User Manual explains the processes to go through should the QSR call for changes in results chains or impact projections. All Sector Analysts and their teams will be expected to prepare as follows:

² Ideally, Senior Sector Analysts should arrange to hold their regular monthly portfolio meeting just before the QSR

Preparation ahead of QSR

- Update intervention and sector guides
- Complete quarterly intervention progress update
- Submit to Senior Sector Analyst for comment and feedback
- Prepare and complete presentations
- Prepare questions that need to be discussed and addressed in the following quarter.
- Submit to Portfolio Managers, Stakeholder Engagement Manager, Results Measurement Manager and Project Manager 5 days prior to meeting.

Tasks during QSR

- Give presentation (maximum 30 minutes)
- Initiate discussion on key issues from lessons learned that require decisions/actions
- Suggest/discuss changes to sector strategies if needed
- If appropriate, discuss proposals for new ideas/interventions
- Conduct follow-up on key questions from previous QSRs.

QSR Roles and Responsibilities

QSR Participant	Roles/Responsibilities
Portfolio Manager	<ul style="list-style-type: none"> • Coordinate QSR meeting in coordination with Results Measurement Manager • Appoint Checklist Facilitator and Reporter • Review and approve QSR report
Checklist Facilitator	<ul style="list-style-type: none"> • Schedule QSR meeting • Assign participants to research and present discussion points • Facilitate the QSR meeting and ensure it adequately covers each of the three QSR objectives
Reporter	<ul style="list-style-type: none"> • Assist the Facilitator • Record the QSR meeting and prepare QSR report
Sector Analysts	<ul style="list-style-type: none"> • Prepare for QSR meeting by coordinating updates to Intervention Guide and Sector Guide • Participate in QSR meeting • Conduct follow-up on key questions
Senior Sector Analyst	<ul style="list-style-type: none"> • Review the Intervention guide and sector guide • Guide sector analyst to prepare materials for the QSR

4. QSR Report

After the QSR Meeting the Reporter prepares the QSR report. The contents of the QSR Report are organized by the following sections:

Meeting Details: Provides the date of the meeting and the meeting participants.

QSR Findings: Answers the key QSR questions supported by details from the group discussion of the individual discussion points.

Implications for individual sectors: This includes any updates/change to results chains, identified research needs, reported results etc.

Lessons Learned: Summarizes the primary lessons learned from the past three months.

Follow-Up Questions: Key questions for the next QSR and a description of the plan to follow-up on them.