USAID
FROM THE AMERICAN PEOPLE

LESSONS LEARNED AND BEST PRACTICES

Partnerships Incubator

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INTRODUCTION

At its core, the Partnerships Incubator positioned itself as a learning organization. This perspective enabled us to become valuable thought partners to USAID. By welcoming constructive feedback, experimenting with new approaches, and venturing into untested ideas, we encountered successes and setbacks that provided important lessons for future projects.

As a project of Kaizen, A Tetra Tech Company, the Incubator embedded a continuous learning mentality into our operations from the start. This approach reflects Kaizen's philosophy, a Japanese term for "continuous improvement." In alignment with our commitment to knowledge sharing, ongoing learning, and a fail-adapt-improve ethos, the Incubator established a rigorous process to identify, analyze, and document lessons learned and best practices. We recognized that the insights we gathered as a USAID pilot could be invaluable to other organizations, especially those newer to development work or with less experience collaborating with USAID.

This report serves as a framework to help others avoid pitfalls and enhance their efforts toward achieving their goals. It highlights key lessons learned and best practices implemented during the groundbreaking, five-year, $47 million USAID Partnerships Incubator project. To provide a structured and coherent narrative, these insights are aligned with four of USAID Learning Lab's 5 Ps of Knowledge Management: People, Process, Problem Solving, and Partnership.

By sharing the lessons and best practices refined over five years of project implementation, we aim to give other projects a head start in developing strategies that enhance efficiency and effectiveness. We strive to foster new approaches that benefit USAID and its partner ecosystem, ultimately driving more significant impact and innovation in development work.

PEOPLE

An organization's most important resource is its people. This was especially true for the Partnerships Incubator. We took every opportunity to invest in our people as contributors to and users of knowledge in this project. Examples include maintaining a horizontal organizational structure in which anyone could contribute the next great idea and enabling direct experience for Incubator team members as service providers and not just as managers of others who provide services (i.e., consultants and subcontractors).

As shared in the USAID Learning Lab, the People domain covers three subareas:

- Resources or human capital required for continuous learning
- Senior management leadership in knowledge management (KM)
- Organizational culture supporting knowledge sharing and networking

In the following pages, we describe four lessons learned and six best practices that relate to Incubator people:

LESSONS LEARNED

1. Obtain specialized skill sets through a Blanket Purchase Agreement.
2. Involve the entire team in recruitment and hiring.
3. Hire "utility players" committed to project goals.
4. Enable implementation of multiple projects via a pod structure.

BEST PRACTICES

1. Maintain a horizontal organizational structure.
2. Recruit local experts to incorporate local knowledge for accurate context.
3. Establish trusted vendor relationships.
4. Hire staff and consultants with strong writing skills.
5. Engage staff members as "consultants" on individual projects.
6. Lean on Agency advocates to help with communication.

LESSONS LEARNED

1 LESSON 1: Obtain specialized skill sets through a Blanket Purchase Agreement.

Background:

A Blanket Purchase Agreement (BPA) is a simplified method of filling anticipated repetitive needs for supplies or services by establishing "charge accounts" with qualified sources.[1] This pre-established agreement enables an organization to purchase commonly used services from a vendor as needed over a defined period. BPAs reduce administrative burden, shorten the time required to purchase services, and enable a more collaborative relationship with a vendor.

The Lesson:

When the Partnerships Incubator first began to deliver services to the Agency and local partners, activity leads would conduct a traditional recruitment process to identify, select, and onboard independent consultants for individual task orders. Posting positions, collecting and reviewing resumes, shortlisting and interviewing candidates, and completing the hiring and onboarding process took too long. It interfered with the Incubator's intention to roll out service delivery rapidly. The time it took to complete the typical recruitment process infringed on the time available to provide valuable services to the Agency and partners that urgently needed to deliver on a current USAID award successfully or to become more competitive for future awards. Additionally, the consultants recruited were often new to the Incubator, without an observed track record of success, which introduced a degree of risk.

The Pivot:

The Blanket Purchase Agreement provided valuable flexibility for bringing on specialized support. The Incubator's BPA included eight vendors prequalified to deliver services in one or more of 16 categories, including financial management, compliance training, organizational mentorship, and human resource management. Prequalifying vendors in these categories led to significantly shorter and simpler vendor responses to individual task orders and reduced time needed to review proposals and make a selection. The modified process from task order release to vendor selection took as little as two weeks, significantly improving the necessarily longer initial processes.

1 Federal Acquisition Regulation, Part 13 - Simplified Acquisition Procedures

The Incubator delivered support to USAID Missions and partners worldwide. Procuring consultant services through the BPA enabled us to engage with broad networks of vendors that conduct global activities with international contacts rather than conducting our recruitment efforts, which burdened already-stretched Incubator staff. We could readily fulfill technical expertise and language requirements using the BPA's consultant network.

Consistently sourcing consultants and service providers through the BPA enabled familiarity and trust with vendors. The vendors learned about Incubator working methods, expectations, and objectives. This allowed a rapid start to many activities, optimizing the often-limited time we had to deliver superior services to our clients.

HOW TO APPLY THIS LESSON:

- ✓ **Choose due diligence procedures that help rather than hinder.** Identify methods to shorten the vendor procurement cycle while preserving confidence in vendors' ability to deliver.
- ✓ **Establish streamlined evaluation criteria and stick to them.** Limit vendor procurement inquiries to information essential to your selection decision.
- ✓ **Compile a question bank to decrease response times.** Anticipate vendor questions specific to a procurement and provide the information they need to craft short, specific, informative responses to task orders and requests for proposals (RFPs).

2 LESSON 2: Involve the entire team in recruitment and hiring.

Background:

Including a range of Partnerships Incubator staff members in the recruitment and hiring process, instead of using a team limited to recruitment, led to better hiring decisions, increased team morale, and enhanced employee retention. When team members participated in selecting new hires, they contributed diverse perspectives, helping to assess how well a candidate fit, not only in skills and experience but also in Incubator culture and team dynamics.

The Lesson:

In several early instances, the recruitment process yielded a candidate who either did not fit well with the Incubator's culture or lacked the management, writing, or analytical skills required for effective job performance. In at least two cases, selecting a less-than-ideal candidate impacted client relations, resulting in the need to replace a team lead. In other instances, selected candidates did not possess the entrepreneurial mindset or ability to work through ambiguity and turn ideas into practical results.

The Pivot:

As a result of these lessons learned, the Incubator became more strategic in selecting candidate interview panels, drawing on the varied experiences of all Incubator staff members. This shift improved the likelihood that a new employee would fit culturally and connect with our team dynamics. When the team had a say in a hiring decision, its members became more committed collectively to the new hire's success, more successfully integrated the new employee or consultant, and conducted better proactive, supportive onboarding. Various team members identified strengths and concerns during the interview that might not have been evident to the hiring manager alone. Team members who would work directly with a new hire were ideal evaluators of a candidate's practical skills and knowledge.

When team members participated in interview panels where they had to articulate the Incubator's work style and values, they also reinforced their job satisfaction. Speaking to outsiders about the Incubator team fostered a sense of pride and camaraderie.

The Incubator benefitted from developing and using a structured, consistent methodology for team members' feedback on candidates. Using a standardized approach, we evaluated each candidate we hired using the same criteria, which provided a fair and consistent assessment. Feedback mechanisms that considered cultural fit helped align new hires with Incubator values and identify their ability to work well within the team culture.

HOW TO APPLY THIS LESSON:

- ✓ **Establish evaluation criteria at the start.** Before reviewing resumes, gather insights from the team on the skills, experience, and personality traits they believe a new team member should possess.
- ✓ **Strategically select a panel of team members for each interview process.** An interviewing team can include people who will work directly with a new hire and people who will interact with them less frequently but who possess a unique lens for evaluating a candidate's specific attributes.
- ✓ **Offer staff the opportunity to share their view of the work culture.** Invite interview panelists to reflect on what they enjoy about their work, helping to foster a sense of pride and shared values.
- ✓ **Implement a standardized feedback mechanism, such as scoring sheets or structured forms.** Standardized feedback helps capture consistent, objective feedback from team members. Following each candidate interview, hold feedback discussions during which team members can discuss their thoughts about candidates.

3 LESSON 3: Hire "utility players" committed to project goals.

Background:

The most consistent feature of successful hires was that they brought both a wealth of skills and an interest in learning new ones beyond those listed on their resumes. Employees like this were technical experts in their own right, but they operated with an eye on the project's overall needs and stood ready to support those needs to elevate the project.

These utility players took the initiative and were self-driven, gaining equal satisfaction from supporting the team on routine, under-the-radar tasks as they did from advancing high-priority, high-visibility objectives. Utility players experienced fulfillment from pitching in and not necessarily getting the credit for it—although giving credit for a strong team effort was also a hallmark of the Partnerships Incubator. Utility players enjoyed contributing to team accomplishments and seeing the results of the group's effort.

The Lesson:

It became clear in the inaugural year of the Partnerships Incubator that we were essentially launching a start-up business consulting firm. We needed to identify the services we would deliver, the processes we would employ to provide those services and the people and technology platforms that would support us. We needed staff with an entrepreneurial mindset who could easily take ambiguous ideas and evolve them into concrete outcomes. We were not working with a stable infrastructure or mature processes in place—we were creating new operating methods instead of operating under the status quo. The types of people necessary to operate in such an environment were utility players willing to roll up their sleeves and do the gritty work of documentation and process definition in addition to the creative work of conducting market analysis, identifying gaps, and building services to fit the needs.

After our first year, it became clear that some members on the team were more comfortable operating in a prescriptive environment where tightly defined assignments were given rather than using creative skills to identify problems and putting together plans and approaches to solving them. Before the eventual Agency buy-ins that would allow us to expand our team, we didn't have room on the small team to accommodate members who were not entrepreneurial-minded or were unwilling or unable to take on tasks outside the job description geared for the success of the Incubator as a whole.

The Pivot:

Recognizing our need for more proactive, creative-thinking team members, we changed our mindset and hiring practices. We expected all hired team members to adapt to needs and circumstances as they developed. Instead of operating in the strict lane of the job description, every team member was expected to modify their efforts to the client's frequently and rapidly changing needs and circumstances.

One excellent example of this was the Incubator's Partner Directory editorial review process for WorkwithUSAID.gov. Our team reviewed the submitted profiles with staff from various parts of the project, including our Deputy Project Director, who regularly reviewed a batch of profiles to maintain the flow of new profiles into the Directory. The Incubator's communications team held periodic training sessions to help ensure that team members became comfortable with the process.

Sharing in a group activity like this provided a sense of camaraderie and also exposed team members who did not regularly work on the WorkwithUSAID.gov site to this platform. With this increased awareness, team members were able to better support partners.

HOW TO APPLY THIS LESSON:

- ✓ **Encourage team members to self-evaluate using a personality assessment.** Helpful assessments include the KolbeA, Gallup StrengthsFinder, Trendhunter Innovation Assessment, and the Sparketype evaluation. These evaluations can help managers determine additional insights into what makes someone tick and where they can capitalize on each person's strengths and motivations.
- ✓ **Ask questions to understand if a job candidate embraces a growth mindset.** In job interviews, ask questions such as, "Tell us about a time when you learned something new." or "Tell us about a time when you were asked—or you volunteered—to support an effort outside your job description." Reactions and responses to these questions can help you identify team members with a "utility player" mentality.

4 LESSON 4: Enable implementation of multiple projects via a pod structure.

Background:

Partnerships Incubator services were in high demand throughout contract Year 4 and Year 5. During Year 4, the Incubator completed 21 distinct Mission, Bureau, and Operating Unit (M/B/OU) buy-in activities. In Year 5, the Incubator delivered 24 different activities. These activities covered a broad range of objectives, including identification of local partners previously unknown to a Mission, partner assessments of readiness to work with the Agency, partner capacity strengthening, co-creation workshop planning and facilitation, ways to work with USAID educational webinars, communications strategies and messaging, and business process re-engineering, among many others. With the high volume of activities covering a wide range of objectives, the Incubator required a service delivery model that could rapidly scale and leverage the entire team's expertise, backgrounds, and knowledge.

The Lesson:

Early in the project, the Incubator focused on developing a menu of services it would ultimately offer to USAID and partner organizations, processes for delivering those services, and messaging needed to raise awareness of the Incubator as a resource throughout the Agency. The Incubator initially offered limited support activities with a small core team augmented by contracted consultants. However, that model would not support the anticipated ramp-up of Incubator services as we increased the promotion of our capabilities and offerings. We needed a service delivery model that would scale to meet the demand.

The Pivot:

To achieve the goals of scalability and pooling of expertise, the Incubator created a pod structure for service delivery to local partners and Agency clients. Each pod was led by an acceleration director and an acceleration liaison who managed buy-in activities assigned to a pod. As needed, the director and liaison planned the delivery and implementation of services with a team of consultants selected based on required skills and technical expertise relevant to the needs of a specific buy-in activity. At its peak, the Incubator delivered services through as many as four pods, each managing three to five long-term activities.

This pod structure was instrumental for three primary reasons.

1. **Efficiency:** The structure enabled a roughly equal distribution of buy-in activities and assignments so multiple projects could progress along similar, often compressed, timelines.
2. **Peer-to-Peer Learning:** Weekly pod meetings allowed peer-to-peer learning in all pods. These meetings provided time each week for pods to present ideas and approaches to their peers and get feedback. In many instances, pods were delivering similar services and products. Templates and formats that worked in one setting were leveraged in other settings, which allowed the teams to save time by avoiding reinvention and duplication. The teams shared solutions to common challenges, enabling pods to break through barriers and progress more rapidly than if operating independently in siloes.
3. **Cross-Departmental Collaboration:** Acceleration Liaisons supported multiple Acceleration Directors and floated between pods. This enabled Liaisons to experience a variety of management styles and learn from the experience.

HOW TO APPLY THIS LESSON:

- ✓ **Host regular meetings for problem-solving and learning.** Set up a team meeting structure specifically for problem-solving and sharing lessons learned, experience, tools, and templates. This enables individual team members to benefit from their peers' knowledge and experiences to overcome project roadblocks and challenges, create innovative solutions and strategies, reuse successful tools, and save time and effort.
- ✓ **Understand staff career-growth trajectories and facilitate access accordingly.** Structure activity assignments and team member responsibilities to optimize opportunities for (1) professional growth and (2) exploration of varied geographies, technical areas, and management styles. Through the Incubator's pod structure, directors and liaisons expressed their desire to work on buy-ins aligned with a personal interest, gain a new experience, or further develop existing skills and competencies.

BEST PRACTICES

1 PRACTICE 1: Maintain a horizontal organizational structure.

Background:

Embracing a horizontal organizational structure is an innovative approach that recognizes and values the input of all team members regardless of their rank or tenure. The Partnerships Incubator regarded each contribution equally important, and viewed work portfolios as collective achievements. This philosophy nurtured a collaborative atmosphere and supportive culture where ideas flowed freely, and we focused more on shared success than individual achievement.

Team members interacted with colleagues respectfully, without rank or hierarchy. Senior team members rolled up their sleeves on time-sensitive activities and pitched in on projects alongside entry-level team members. Conversely, senior staff members routinely involved more junior colleagues in driving forward high-level deliverables. By stepping back from titles and categories, team members stayed focused on the "greater good" of the project.

Our experience:

At the Incubator, we adhered to the principle that no task was too complex for junior staff and no responsibility was too minor for leaders. This approach was instrumental in our operations. Senior leadership often participated in routine tasks, embodying a hands-on approach and serving as "consultants" to other divisions. Conversely, interns and junior members frequently were entrusted with significant client-facing responsibilities. This inclusive strategy allowed every team member to carve out their niche, contributing according to their unique capabilities and availability and fostering a sense of ownership and belonging across the board.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Promote a culture of asking for and offering help.** This will allow others to become involved in areas that interest them, demonstrate goodwill that supports project morale, and strengthen team bonds.
- ✓ **Give all team members access to a variety of projects and tasks.** Every team member should be able to participate in varied types of work, including high-impact and high-visibility assignments.
- ✓ **Celebrate successes as both team and individual accomplishments.** Make sure recognition is distributed fairly, acknowledging contributions at all levels within the team.
- ✓ **Invite members at different levels to participate in decision-making and processes.** Give voice to diverse perspectives and offer everyone a seat at the table.
- ✓ **Maintain open channels of communication.** Welcome suggestions and feedback from every tier of the organization.

2 PRACTICE 2: Recruit local experts to incorporate local knowledge and context.

Background:

Incorporating local expertise enhances an organization's knowledge base and aligns with the principle of localization, which the Incubator exists to enhance. The skills and insights of local consultants should be leveraged to gain a deeper understanding of the context for operation, establish the relevance and effectiveness of interventions, and build stronger relationships with the communities served. Local experts bring invaluable on-the-ground perspectives, cultural competencies, and often a nuanced understanding of the local language and systems that external consultants may lack.

Recruiting local experts allows organizations to enrich projects with localized knowledge and expertise and demonstrate a commitment to the principles of localization, which can lead to more effective, sustainable outcomes. When it is clear that local experts are not just executors of predefined tasks but are integral in shaping the direction and outcomes of projects, the resulting sense of ownership can lead to more sustainable, more effective results.

Our experience:

The Partnerships Incubator's engagement of local consultants was a game-changer. These experts provided insights grounded in the lived experiences of the communities we aimed to serve. They contributed to diverse ideas and strategies and enhanced the credibility and acceptance of our work in local settings. Local experts acted as cultural brokers, navigators, and partners to create sustainable, effective programs.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Include local consultants in the decision-making process.** Consultants who know the communities where we operate can reveal the context of traditional practices and community dynamics. They contribute a nuanced understanding of the local social, political, and cultural environment, which is important to strategic planning and execution.
- ✓ **Invest in strategic partnerships with local consultants.** Build long-term relationships with local consultants because this continuity can lead to greater trust and a more profound impact over time.

3 PRACTICE 3: Establish trusted vendor relationships.

Background:

Establishing trusted vendor relationships is crucial for the success and sustainability of any project or enterprise. Vendors are pivotal in affecting product quality, delivery timelines, and overall operational efficiency. Building strong partnerships with vendors goes beyond transactional interactions and involves cultivating mutual trust, open communication, and shared goals. The foundation of a successful vendor relationship is transparency, integrity, and a commitment to long-term collaboration.

Our experience:

We encountered successes and challenges in our journey to establish trusted vendor relationships. Due diligence in vendor selection was essential. We thoroughly researched potential partners, worked to understand track records, and assessed capabilities to mitigate risk and align with business objectives.

Open communication was another critical factor. Regularly engaging vendors, sharing expectations, and providing constructive feedback fostered a collaborative environment. This communication extended to acknowledging successes and expressing appreciation for a well-done job. Building relationships based on transparency and effective communication created a solid foundation for overcoming challenges.

Additionally, we found that investing in relationship-building activities paid dividends. This included face-to-face meetings, attending industry events together, and even joint problem-solving sessions. These efforts contributed to a deeper understanding of one another's processes, challenges, and strategic goals, further strengthening the bond between parties.

The Partnerships Incubator learned that working with local vendors can demonstrate "localization in practice" and achieve more successful development results. This was the case in the Dominican Republic, where the Incubator deployed an assistance model leveraging the skills and experience of a local partner to benefit other local partners.

We identified one of the stronger local partners through a Partner Landscape Assessment. The organization was competitively selected to serve as the Incubator's subcontractor, delivering technical assistance to four other local partners. Shared experience in the local context sets this subcontractor's approach apart. For example, the firm's members had experience navigating national government ministries and, as a group, understood the cohort members' challenges. They had overcome similar challenges in the early years of partnership with the USAID Mission in the Dominican Republic. The Incubator mentored the organization through its service delivery and has engaged the organization on other projects, providing an opportunity to demonstrate its ability to work outside the Dominican Republic in other Latin American and Caribbean countries.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Acknowledge and promote vendors' successes publicly.** In client meetings and project reporting, give kudos and share credit with vendors and subcontractors.
- ✓ **Communicate regularly with vendors.** Find messaging channels that enable you to communicate effectively with trusted vendors and subcontractors and respond promptly to questions and needs.
- ✓ **Strengthen local vendors new to USAID.** When contracting with new local vendors, take the opportunity to help them strengthen management and operational capacities in a manner that is valued and helpful to USAID and the partner itself to support longer-term sustainability and partnership.

4 PRACTICE 4: Hire staff and consultants with solid writing skills.

Background:

Writing skills were paramount in the demanding environment of the Partnerships Incubator, where the pace was relentless, and expectations for both productivity and quality were high. Writing proficiently was not merely a beneficial skill for consultants—it was essential. The consultants we brought on board were regularly tasked with clearly articulating complex concepts, presenting sensitive information, and convincing stakeholders through various forms of written communication, including detailed reports, concise emails, and engaging presentations. The high level of professionalism and credibility of the work we presented to the Agency was a direct testament to the level of writing proficiency our consultants demonstrated.

Our experience:

The Incubator consistently found that consultants who excelled in written communication could elevate project quality. The ability to write with clarity and persuasiveness is directly correlated with effective project outcomes and stakeholder relations. It was about more than just writing well; it was about conveying ideas in understandable and compelling ways to diverse audiences. Consultants who were skilled writers enhanced the Incubator's reputation, contributed to smoother project execution, and reduced the need for time-consuming revisions. Conversely, consultants who did not possess this ability slowed the team's progress because additional levels of review and revision were required.

Initially, we requested writing samples from candidates required to develop written content in their roles. We found that those samples did not reflect the candidates' actual abilities. An excessive number of candidates submitted strong writing samples but could not generate strong writing in a project setting. To solve this problem, we began including a writing evaluation during candidate screening.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Administer brief project-related writing tests to shortlisted candidates.** Real-time assessment is the most effective way to evaluate writing ability effectively. A 250- to 500-word writing test with a short turnaround time is adequate.
- ✓ **Develop and uphold high standards for written work.** Communicate writing expectations to the team and consultants, and review all written material before external submission to align it with these standards.
- ✓ **Encourage a culture of constructive feedback.** Welcome feedback on written work. Help consultants refine their writing skills over time.
- ✓ **Leverage writing technology and software.** Tools such as Grammarly and ChatGPT are effective grammar checkers and style guides to improve writing skills.

5 PRACTICE 5: Engage staff members as "consultants" on individual projects.

Background:

When staff members served as support providers, it yielded many benefits, from fostering a collaborative culture and promoting professional growth to optimizing resources and spurring innovation, all while enhancing job satisfaction and loyalty.

This approach can help an organization shift toward enhanced cross-departmental collaboration. It provides staff members a platform for perpetual learning, inspiring them to embrace new challenges and refine their skill sets. As they navigate varied projects, they accumulate a wealth of experiences that benefit career growth and enrich the organization's reservoir of expertise.

Our experience:

At the Partnerships Incubator, team members were our greatest assets. They possessed diverse prior experiences and a rich combined skill set ripe for application across activities and partner support. We activated this internal wealth of knowledge by providing opportunities for staff to serve as consultants and support providers. In addition to using our human resources, it increased job satisfaction, broadened individual competencies, and strengthened staff retention.

Team members at all levels, including the Incubator's project director, served as consultants during a project's life. Setting this example from the top allowed teams to implement the internal consultancy model. This approach enabled us to respond to project demands rapidly and avoid the need to seek skills externally.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Catalog and build awareness of the breadth of team member skill sets and leverage their experience and expertise for service delivery.** Cataloging and highlighting team members' capabilities allows managers to draw on appropriate internal resources with agility to respond to project needs.
- ✓ **Support internal staff to step out of their comfort zones and gain new experiences.** Encourage team members to take on new roles and tasks with guidance and support from more experienced staff.
- ✓ **Require senior leaders to model cross-project consulting.** Setting an example from the top down precedes cross-project support and encourages others to do the same.

6 PRACTICE 6: Lean on Agency advocates to help with communication.

Background:

Effectively communicating with USAID counterparts about the value, costs, and timelines of services such as those offered by the Partnerships Incubator is crucial for operational success. Agency advocates are pivotal in this communication stream because they bridge the gaps between service providers, clients, and stakeholders. These advocates were the voice of the Incubator within USAID, offering clarity and assurance to Missions and Bureaus about what they could expect from Incubator support in terms of cost and time.

Empowering USAID champions and advocates with the right tools, information, and support allows them to amplify their communication's reach and impact, which helps inform stakeholders and align project outcomes with expectations.

Our experience:

In our work with USAID, we saw the power of equipping internal champions to communicate the Incubator's offerings effectively. We benefited from individuals providing details about our services to their colleagues at USAID Missions and Bureaus, articulating timeframe and costs associated with our partner support, and helping us set accurate expectations with stakeholders. To aid activity planning and implementation and build trust and credibility, we provided Agency advocates with detailed information on service provision, including transparent cost structures and realistic timeframes.

The efforts of USAID advocates and champions facilitated a seamless partnership between the Incubator and USAID Missions and Bureaus, leading to goal alignment and enhanced cooperation and collaboration.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Leverage point persons within the Agency to be advocates.** Identify key individuals who understand and believe in the project mission and empower them with ready-to-use advocacy kits that include talking points, presentations, FAQs, cost breakdowns, etc.
- ✓ **Set up systems for advocates to report stakeholder feedback.** This feedback is crucial for adjusting service offerings and communication strategies. In the same light, acknowledge advocates' contributions. Recognition can be a powerful motivator and can encourage ongoing commitment and enthusiasm.
- ✓ **Anticipate and be prepared to respond to concerns.** Prepare for contingencies and give advocates details to help them handle stakeholder questions or concerns. Advocates should be well-equipped to provide clear, concise, factual information highlighting the organization's positive service capacity.

PROCESS

The processes and supporting systems that enable the work of staff and partners are critical to a project's ability to encompass qualities of continuous learning and adaptation. In the Partnerships Incubator, we closely monitored processes that work toward consistently high performance and contingency planning.

The process represents a series of actions or steps learned and applied to achieve project objectives.

As shared in the USAID Learning Lab, the Process domain covers the following three subareas:

- Learning strategy aligned with the broader mission of the organization
- Knowledge flow and cycle of assessing, capturing, generating, adapting, and sharing knowledge
- Measurement, including M&E systems and indicators

In the following pages, we describe four lessons learned and six best practices that relate to our Process:

LESSONS LEARNED

1. Avoid scope creep.
2. Connect metrics with hours worked.
3. Maintain a proper closeout period.
4. Apply the "rule of three" in the management of meetings.

BEST PRACTICES

1. Keep running meeting agendas with notes.
2. Use good design for good business.
3. Elevate the contributions of subcontractors.
4. Emphasize responsiveness to build trust with the Agency.
5. Apply standardization to drive efficiency.
6. Develop proof of concept for desired outcomes.

LESSONS LEARNED

1 LESSON 1: Avoid scope creep.

Background:

Each Partnerships Incubator engagement with a USAID client began with co-creation. Even before funds were obligated, Incubator staff often met with the Agency to learn what it wanted the Incubator to help achieve and then wrote a draft scope of work (SOW), which was also needed for the obligation of funds. Sometimes, discussions were straightforward, with a clearly defined goal. In other instances, it took several rounds of guided discussion and the exchange of documents before USAID and the Incubator collectively determined the best approach.

The Lesson:

The need to protect against unmanaged scope creep became clear during technical assistance delivery to a group of partners in Latin America. For several partners, scopes of work were written loosely, without concrete definitions of support completion. Instead, support delivery included ongoing general coaching and mentoring in financial management and executive advisory strategies. The team and partners addressed more specific needs and performance gaps as they were discovered throughout a regular cadence of partner meetings rather than completing a defined deliverable that would have provided a more concrete goal.

As important specific issues continued to be discovered, consultants received permission to provide support without considering time and budget limitations. Ongoing mentorship without strict end-date expectations did provide value. However, some partners were confused and disappointed when we closed the support.

The Pivot:

The Incubator incorporated a system to manage scope according to time and budget limitations. Of course, scope-of-work creation doesn't stop after the co-creation process described above. Because changes are an inevitable part of any activity, the ability to adjust during implementation was critical. Following initial co-creation, we transitioned draft scopes of work into more flexible "living documents" for the remainder of the SOWs. Changes needed during implementation had to be agreed upon by the Incubator and USAID. Even small changes could cause significant issues if they weren't documented properly, so it was important that any mutually agreed upon decision altering the work would be documented in the SOW. Without documentation, implementation slowly shifted, often unnoticed, until the project scope was suddenly well beyond the intended definition, adding cost and time to the project.

As an activity drew to a close, changes to the SOW became no longer feasible, given time and budget constraints. Only at this point did the living document become final. There was no prescribed time at which the SOW ceased to be alterable, but keeping it consistently updated aided those conversations. It helped determine when it was appropriate to finalize the document.

HOW TO APPLY THIS LESSON:

- ✓ **Jointly agree to collaborative editing norms for the SOW.** Establish clearly defined criteria for determining, with the USAID client, when a SOW transitions from a draft version into a nearly final living document. Agree to the rules of engagement and processes for making mutually agreed-upon changes to the living document version. For example, with all of our clients we agreed there were no unilateral edits to SOWs. We used the Google Docs Suggesting and Commenting features until we agreed. At that time, suggested edits were accepted, and comments were resolved. We also worked exclusively on the original document to maintain version history.
- ✓ **Be flexible, but know when to say "no" to scope changes.** Documenting the evolving nature of a scope of work provides evidence of flexibility or inflexibility. It can help implementers justify when adjustments can no longer be made, particularly near the end of the engagement. Collaboration with a supportive and well-informed Agreement Officer's Representative (AOR) or Contracting Officer's Representative (COR) can make it easier to say "no" to client-requested changes at any point during the activity.
- ✓ **Keep your AOR or COR informed of any deliverable-related SOW changes.** When submitting final deliverables to the USAID client, provide a copy to the AOR or COR and share the SOW again. This allows the AOR or COR to confirm that deliverables match the SOW, and they can intervene if the client asks for anything out-of-scope at the last minute.

2 LESSON 2: Connect metrics with hours worked.

Background:

Collecting metrics beyond the usual indicators enabled us to track valuable insights for the client and practical insights into the amount of work completed by our team. This helped us understand whether we were meeting the client's needs and balancing team capacity over time. Quantifying the number of hours worked, and the capacity of the team members for a successful activity also helps the Agency determine long-term staffing needs and understand how to sustain that type of activity in the future.

The Lesson:

Every Partnerships Incubator team member screened and approved Partner Directory profile submissions for WorkwithUSAID.gov. In the process, we collected metrics such as the number of profiles approved, rejected, and resubmitted and the number of submitters identified as local partners or new to the Agency. These statistics helped the Agency understand the partner ecosystem's landscape and how users interacted with the platform.

However, as we did with our external consultants, we did not initially track the time each Incubator staff member contributed to the directory work. It became clear that the Agency would need to document this staff level of effort (LOE) for reporting and planning purposes. When we finally began tracking staff LOE, it became apparent that individuals had managed the additional work demands. Still, the Incubator collectively dedicated too much time to the directory at the expense of other project needs. Connecting directory metrics with Incubator staff hours gave us the metrics we needed to provide the Agency with estimates of staffing patterns required to maintain the directory after the Incubator ended. Still, it also allowed us to apply changes to other aspects of our work.

The Pivot:

In addition to formally tracking LOE for Partner Directory profile reviews, we asked Incubator team members to estimate their hours worked for several other activities. This included average LOE for writing initial scopes of work for buy-ins, conducting key informant interviews for partner landscape analyses, drafting technical assistance plans for partners, and more. Eventually, we reviewed most individual components of the Incubator's work regarding the LOE needed to deliver an entire activity. Not only did these metrics allow Incubator staff to better manage their time within expectations and capacity, but they also allowed us to improve our tracking of consultant LOE. Based on their experience, Incubator staff could identify when hours seemed insufficient or excessive for a consultant-billed task. We could then engage the consultant in a conversation about the quality and quantity of work delivered based on first-hand knowledge of the estimated LOE. Identifying misaligned LOE and making corrections enabled more effective and efficient handling of project funds and personnel.

HOW TO APPLY THIS LESSON:

- ✓ Link time-tracking to project deliverables, indicators, and general metrics. When an organization evaluates the metrics of an activity as part of a monitoring, evaluation, and learning plan, it can also make formulas and calculations of the hours worked to help determine the staffing required to carry the work forward.

3 LESSON 3: Maintain a proper closeout period.

Background:

For projects funded by USAID, the closeout period is not merely a recommendation—it's a prerequisite for ensuring compliance with federal regulations and the cooperative agreement or contract terms. The closeout period is essential when all required administrative actions and work of the agreement are completed. This period is particularly critical due to stringent accountability guidelines, funds utilization, and project impact measurement. Closeout typically involves rigorous documentation, evaluation of outcomes versus objectives, financial reconciliation, and final reporting.

Meticulously executing a closeout period for USAID-funded projects complies with contractual obligations and contributes to the accountability and success of development efforts. Proper closeout practices help confirm that every dollar is accounted for, every objective is reviewed, and the project's legacy is preserved through comprehensive documentation and knowledge sharing.

The Lesson:

In Year 4, as the Partnerships Incubator approached its end date in September, it needed to be clarified whether a modification to add a fifth year would come through. We anticipated an extension, but the Incubator had to continue preparing for closeout under its current contractual deadline. In addition, for various reasons, buy-in activities and technical assistance delivery to partners stretched into July, August, and even September, requiring the time and attention of team members who otherwise would have been focused on the multitude of closeout tasks and documentation. This situation presented a bandwidth issue, severely limiting team members' availability to complete critical closeout activities. The team experienced unnecessary stress and strain due to project activities continuing into a closeout period that should have begun in April.

The Pivot:

USAID granted the fifth year. To adequately close out the project, the Incubator proactively communicated to clients in the beginning stages of each new Year 5 buy-in that all project activities must end by April 15. With this expectation set and communicated, activities would only continue beyond that date under exceptional circumstances.

Establishing a proper closeout period was instrumental in safeguarding against a hasty and potentially incomplete conclusion of project delivery. Allowing adequate time for closeout activities in Year 5 meant that all contractual requirements were met, final payments processed, and any claims or disputes resolved. It also provided a window for completing all project documentation, including final reports, performance evaluations, and lessons learned.

Furthermore, the structured closeout period enabled the project team to conduct a thorough review of the project, encompassing an assessment of goals achieved versus initial objectives. It facilitated a detailed inventory of project outcomes and supported knowledge transfer to USAID and other stakeholders.

Finally, maintaining an appropriate closeout period allowed the Incubator to adjust to staff departures, which are an inevitable part of any project end. While funds and work were available to maintain the entire team through the Incubator's period of performance, several team members began departing for their next opportunities six to eight months before the project ended. Safeguarding the closeout period allowed the Incubator to adjust staffing patterns while maintaining service delivery excellence.

HOW TO APPLY THIS LESSON:

- ✓ **Establish a detailed closeout plan that aligns with USAID requirements and timelines.** Integrate the closeout phase into the project life cycle from the beginning.
- ✓ **Communicate closeout procedures and timelines to all stakeholders.** This clarifies roles and responsibilities. Keep USAID informed of your closeout plan and seek its input as needed.
- ✓ **Meet all legal and contractual obligations and archive all necessary documents.** This includes evaluations, audits, inventory lists, and property disposal according to USAID regulations.
- ✓ **Complete and submit all final technical reports and deliverables.** Make sure reports and deliverables meet USAID's quality standards and deadlines.
- ✓ **Capture lessons learned to share with stakeholders.** Evaluate the project's performance, capturing lessons learned and recommendations for future initiatives. Share findings with USAID, partners, and others within the organization.
- ✓ **Implement a transition plan to ensure the sustainability of project outcomes after USAID funding ends.** This might involve transferring responsibilities to local partners or integrating project activities into local government systems.
- ✓ **Be prepared for a post-closeout audit.** Make records audit-ready and accessible to prepare for a possible USAID post-closeout audit.

4 LESSON 4: Apply the "rule of three" in the management of meetings.

Background:

Employing the "rule of three" in meeting management can yield significant benefits. This concept helps ensure that client meetings are productive and goal-oriented and that no critical information or insight is lost. The "rule of three" is explained below.

The Partnerships Incubator designated three roles for client meeting success:

1. The discussion manager kept the conversation on track and on time.
2. The big-picture thinker was ready to connect the dots and raise pertinent questions.
3. The notetaker documented the discussion, action items, and next steps.

Each participant stayed focused on their role to help us fulfill the meeting's objectives effectively.

By incorporating the "rule of three" into meeting strategies, organizations can capitalize on team members' unique strengths, foster more organized and strategic discussions, and make gatherings platforms for action and decision-making.

The Lesson:

In the early stages of the Incubator, the team conducted interviews with various USAID stakeholder groups to learn the most common and problematic challenges the Agency faces when working with partners new to the Agency's expectations and ways of working. We included a lead facilitator and a notetaker. However, we found we were failing to capture key elements of the discussion, or upon reflection, we realized there were questions we wished we had asked.

The Pivot:

We began including a third participant as an active listener and a second lens to identify and follow up on exciting discussion threads and ideas that arose during the meeting. Combining these three roles made meetings much more productive and effective regarding reflection and follow-up. After a meeting, these three individuals collaborated to review notes, consolidate insights, and outline the next steps.

HOW TO APPLY THIS LESSON:

- ✓ **Assign clear roles to each meeting participant before the meeting.** If participants understand how their roles complement one another, they can prepare accordingly. For example, the notetaker should be adept at summarizing points quickly and accurately, while the big-picture thinker should be familiar with the project or organization's strategic goals.
- ✓ **Rotate meeting roles from one meeting to the next.** This builds skills and prevents role fatigue.
- ✓ **Share meeting outcomes and action items with relevant stakeholders.** Communicating meeting results supports transparency and accountability.
- ✓ **Evaluate the effectiveness of this approach and keep iterating.** Adapt the roles or process to better suit your team and meet objectives.

BEST PRACTICES

1 PRACTICE 1: Keep running meeting agendas with notes.

Background:

A running agenda—a living master document with ongoing updates that track topics, discussions, decisions, and action items for recurring meetings—serves as a historical record and establishes continuity between meetings. Participants can refer to this document to recall past discussions, follow up on action items, and prepare for upcoming meetings. By implementing a running meeting agenda with updated notes, a team can significantly enhance meeting productivity, achieve continuity, and maintain a clear focus on objectives and responsibilities.

Our experience:

In our experience, running meeting agendas streamlines collaborative processes. This approach helped us reduce discussion redundancy, keep team members aligned on project goals, and efficiently track progress on action items. It was also invaluable for onboarding new team members because they could easily catch up on project history and understand current status.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Use a collaborative tool.** Lay the foundation with a collaborative platform (e.g., Google Docs) that becomes the single "source of truth" for meeting agendas. This shared document should be accessible and editable by all meeting participants, thereby democratizing information flow and collaboration.
- ✓ **Add agenda items between meetings.** Add items to the shared agenda between standing meetings to avoid overlooking important topics.
- ✓ **Update the agenda as decisions are made.** Update the shared agenda in real time as discussions unfold and decisions are made. This practice builds consensus during meetings and enhances the team's ability to reference and revisit discussions as needed.
- ✓ **Assign action items during the meeting.** This promotes accountability.
- ✓ **Track the progress of initiatives using the running agenda.** This document evolves into a historical ledger, charting the course of long-term projects and serving as an invaluable tool for reporting and strategic analysis. This provides insights into patterns and outcomes that guide future project planning and execution.

2 PRACTICE 2: Use good design for good business.

Background:

Words matter, but how the words are packaged also matters. Communication is relegated to a supplemental activity in many projects because leaders do not understand the importance and impact of high-quality project communication. With a solid graphic design subcontract, project leaders can access a capacity to develop and present ideas visually, create graphics that contribute to the influence of storytelling, and present project deliverables in the most professional way possible. Visually compelling materials aid the communication of ideas and processes and elevate the professionalism of materials. Professional-level copy editing also is an important value-add for all projects.

Our experience:

The Partnerships Incubator teams created outstanding content in response to Agency needs, but graphic design vendor TM Design raised final products to a higher standard that stood apart in the eyes of USAID clients. Professional copy editing, data visualization, and graphic design support led to higher-quality reports that did justice to the excellent content produced by the teams.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Include professional design services within the project scope.** Establish a graphic design and communications subcontract for projects or determine another way to access professional-level graphic design and editing. Many projects attempt to get by with rudimentary staff skills. Still, professional graphic design and copy editing are an investment that will elevate project materials to honor the high-quality work being done and meet client expectations.
- ✓ **Establish a dedicated budget for professional design services.** Include a budget line for graphic design, copyediting, and other communications functions to help ensure that project technical reports and deliverables will have the maximum visual impact and be shared widely.

3 PRACTICE 3: Elevate the contributions of subcontractors.

Background:

Vendors, subcontractors, and other external partners were pivotal to the Partnerships Incubator's success in the diverse project management ecosystem. These entities activated specialized expertise, resources, and capabilities that complemented the core team's efforts. However, subcontractors' contributions can sometimes be overlooked or underrepresented in traditional project reporting, which typically focuses on internal metrics and accomplishments. Elevating the contributions of vendors, subcontractors, and other external entities in project reporting leads to a more comprehensive account of a project's progress. It builds a foundation for more robust, collaborative relationships with these crucial partners.

Our experience:

Through all the projects, we observed several benefits of highlighting the work of external partners in project reporting. Acknowledging partner contributions improved their engagement, enhancing collaboration and leading to a more cohesive project team. Acknowledgment led to more accurate and transparent reporting because external partner contributions can significantly affect timelines, budgets, outcomes, and overall project quality. Sharing this information with USAID also gives the Agency a better understanding of the mechanics behind each project so it can better design and manage programs in the future.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Create reporting frameworks that include work performed by external partners.** Add a reminder in project reporting templates.
- ✓ **Establish reporting guidelines that require documentation of contributions from all entities involved in a project.** Depending on the nature of the work and reporting structure, documentation can include qualitative narratives, quantitative metrics, or a combination of both.
- ✓ **Encourage vendors and subcontractors to provide regular updates.** Integrate the updates into project reports. This might include written summaries, presentations, or contributions to a shared project management platform.
- ✓ **Make it clear that vendor and subcontractor insights are valued.** Confirm that all team members understand vendor and subcontractor perspectives—essential for a complete picture of project health. Recognize achievements, innovative approaches, and even lessons learned from challenges encountered by these partners.

4 PRACTICE 4: Emphasize responsiveness to build trust with the Agency.

Background:

Generally, people and teams only occasionally practice responsiveness in the workplace. In the USAID implementing space, government contractors must follow processes and procedures to be compliant, which can cause things to move slowly. The Partnerships Incubator was different. It made "rapid response" the standard operating procedure across the project while complying with rules and regulations.

Our experience:

We strived to respond to USAID client and partner requests within an hour of receiving a chat, email, or voicemail. This rapid response customer service ethic impressed USAID colleagues and built goodwill. If we didn't have time to respond thoughtfully, at a minimum, we would confirm receipt and provide an estimate of when we could respond fully. The rapid response behaviors earned us a reputation for innovation, agility, and determination to get things done. As work moved online (during the COVID-19 pandemic), this ability to respond rapidly grew significantly.

HOW TO APPLY THIS BEST PRACTICE:

✓ **Set clear expectations for the team about what responsiveness means.** In an online work environment, digital communications responsiveness indicates connection and care. Leadership should specify a "best practice" interval for responding to the client to guide staff.

5 PRACTICE 5: Apply standardization to drive efficiency.

Background:

Creating templates helped standardize our processes. Whether for a digital marketing activity or a financial administrative task, templates reduced administrative burden, limited the time required for research and knowledge sharing, and streamlined processes.

Our experience:

The Incubator was a five-year project that experienced staff changes, contract extensions, and dozens of additional buy-ins, and pioneered entirely new activities and processes for the Agency. Many activities were hallmarks of the Agency's localization efforts and were regarded as activities that would continue. To quickly engage new staff and launch new activities, the Incubator created a series of templates and standard operating procedures that streamlined efficiency and responsiveness. This standardization took shape through various materials, including a robust travel policy and checklist, a thorough slide deck template, staff onboarding checklists, and start-to-finish recruitment procedures.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ Standardize the most repetitive and laborious tasks. Identify a project's most time-consuming operating procedures and explore ways to standardize, automate, and shorten those processes.
- ✓ Develop and normalize a knowledge management protocol. Create a standard method of file naming and resource sharing so that all staff and stakeholders can easily access materials.
- ✓ Establish a central hub for important standard operating procedures (SOPs), resources, and templates. Centralize files in a location such as Google Templates, and introduce the tool during new-employee orientation.

6 PRACTICE 6: Develop proof of concept for desired outcomes.

Background:

For pilot projects or innovative initiatives such as the Partnerships Incubator, we found that designing and developing official proofs of concept provides tangible evidence that a concept, theory, or approach is feasible and likely to achieve the desired outcomes. By demonstrating functionality and potential impact early on, a proof of concept can help secure buy-in from stakeholders, attract further investment, and provide a foundation for scaling up an activity.

Our experience:

In the early stages of the project, we competitively selected a local organization new to USAID to receive a technical assistance package from the Incubator to test our needs diagnostic and service delivery capabilities and demonstrate how we could benefit partners. To select this partner, we applied a careful vetting process to the pool of respondents through a survey that collected feedback on the "Work With USAID" section of the USAID.gov website. Through delivering technical assistance to the partner, we developed and refined our needs diagnostic and approaches for sourcing support providers and developing scopes of work.

This partner support delivery case study was critical to helping the Agency see what was possible. We demonstrated a holistic approach to supporting a partner to develop readiness to partner with the Agency and build the business for scale and impact. We wanted to show the value of not only providing capacity strengthening for partnership readiness but also equipping a partner to be a stronger development actor.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Develop proofs of concept during the project's initial stages, mainly if working with novel services or pilot programs.** This tests the viability of ideas and demonstrates their potential impact on stakeholders.
- ✓ **Incorporate previously untested activity components with the intention of learning.** Incorporating experimentation enables new concept testing in a relatively low-risk environment.

PROBLEM-SOLVING

The right mindset can mean the difference between success and failure regarding project implementation. At the Partnerships Incubator, we recognized the importance of effective problem-solving mindsets from the early stages of the project. We nurtured those mindsets to help overcome obstacles through continuous innovation. As shared in the USAID Learning Lab, the Problem-Solving domain covers the following three subareas:

- Knowledge seeking
- Identification of new ideas and problems
- Critical thinking

In the following pages, we describe four best practices that relate to Problem-Solving:

BEST PRACTICES

1. Promote an "all hands on deck" mentality.
2. Maintain a "yes" mindset but know when to say "no."
3. Apply futures thinking.
4. See ambiguity in a positive light.

BEST PRACTICES

1 PRACTICE 1: Promote an "all hands on deck" mentality.

Background:

An "all hands on deck" mentality encourages employees to support one another in accomplishing larger goals and advancing the project's success. This "swarming" behavior allows a project to promptly deploy resources to tackle critical problems. It also contributes to job enrichment for team members by exposing them to other areas outside their job descriptions.

Our experience:

Within the Incubator's culture, everyone pitched in to get the work done. This fostered a productive, fun, and collegial work environment. There were countless examples of a swarming approach to achieve outcomes and results when tasks were too large for a few individuals. Whether it was summarizing 77 NPI Action Plans from Missions in Year 1, clearing Partner Directory submissions in Year 3, or reviewing nearly a dozen post-award training modules for new assistance partners in Year 5, all 20+ members of the Incubator swarmed to the need. Our employees were united by curiosity, innovation, adventure, and a drive for success. As "utility players," we actively participated in others' portfolios to complete the job.

The Incubator work environment was characterized by achievement and a genuine enthusiasm for helping others achieve top performance and required outputs. This response was only possible in a team environment where everyone went by the mantra "no task is too small" and was willing to step outside job descriptions to help each other. The ability to swarm support to meet a client's need was critical to our reputation for high quality and rapid delivery. We contributed to the overall mission's success beyond responsibility for our tasks.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Reinforce messaging and incentives to support and encourage staff to work beyond their job descriptions.** Instill the "all hands on deck" expectation through reminders at team meetings, on group chats, and on interview panels.Reward and praise team members who go the extra mile to pitch in on activities outside of their job descriptions.
- ✓ **Develop a well-rounded internship program.** Constant rotation of interns through the project, with their energy and willingness to tackle projects, positively influenced the full-time staff.

2 PRACTICE 2: Maintain a "yes" mindset but know when to say "no."

Background:

Many projects are designed with a preconceived technical solution to the problem. However, when activity design begins, authors will unlikely have all the information they need to create programs that meet all stakeholder requirements. Flexibility to make necessary adjustments when operating within uncertainty or ambiguity is essential. Highly uncertain environments also require staff capable of embracing the unknown and comfortable making decisions without all of the facts. The Partnerships Incubator supported an environment where our technical teams could say "yes" in the face of these challenges, serve as proactive diagnosticians examining gaps, needs, opportunities, and challenges, and design innovative solutions.

Our experience:

Tactical flexibility was a project-wide characteristic of the Incubator. We brought a willingness to say "yes" to every discussion, which allowed the development of highly tailored solutions and provided a setting where teams could take advantage of opportunities in real-time. On the other hand, the desire to say "yes" in the spirit of achieving innovation, cooperation, and impact sometimes led to scope creep, overextended staff and budgets, and subpar deliverables. We directed the team to move forward with most client requests through implementation but also empowered team members to say "no" or elevate requests to senior leaders if needed. Our mantra was "Maintain a 'yes' mindsight, but know when to say 'no.'"

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Maintain a special projects line item in the budget to accommodate opportunities, special requests, and other adjustments to planned activities.** This dedicated funding source allows teams to approach new requests or scope changes with a "yes" mindset. Resource mobility allows meaningful programming pivots and an opportunity to take advantage of information unknown during the project design phase.
- ✓ **Clearly articulate organizational priorities.** Understand what truly matters and align decisions with these priorities. This clarity will guide "yes" and "no" responses.
- ✓ **Ask at least three questions to obtain information before saying "no."** Maintaining openness to possibility and curiosity is essential, even if the final answer must be "no." Encourage team members to express workload concerns and challenges. This openness creates a supportive environment where individuals feel comfortable discussing their capacity and potential constraints.
- ✓ **Assess the impact of a new task on existing workload and goals before committing.** Understand potential benefits and drawbacks, and make an informed decision that aligns with objectives.
- ✓ **Periodically reassess commitments and workload.** Circumstances change, and what was manageable before may become overwhelming. Regularly evaluate capacity and adjust commitments accordingly.

3 PRACTICE 3: Apply futures thinking.

Background:

Futures thinking is essential for USAID-funded projects because it allows project managers to anticipate opportunities and challenges. This puts projects in a position to drive innovation, challenge conventional thinking, and explore legacy solutions for the Agency. A forward-thinking approach also positions a project to change and adapt to meet Agency and partner needs and activate a resilient team of utility players who all contribute to the project's success.

Our experience:

Early in the Partnerships Incubator, futures thinking helped us identify and plan for potential activities that could improve the Agency's relationship with partners. With various actors in USAID's ecosystem, we conducted an early listening tour that allowed us to proactively examine emerging trends, sentiments, and needs of stakeholders to develop legacy activities. As a result of this deep examination, we conceptualized WorkwithUSAID.org (now .gov) as a reimagining of how the Agency could respond to and service partners' needs.

Later, when a regional conflict became active in a USAID partner country, the Incubator team jumped in with a recommendation and plan to hide organizations headquartered in that country within the Partner Directory to keep them safe. Our USAID colleagues were grateful for that proactive approach.

Futures thinking also played a key role in designing the organizational pod structure, which was implemented to scale our support for multiple Mission buy-ins. We created the foundation for this structure during the fall of 2020 through an intern project examining potential models for an "Incubator 2.0." Exploring those what-if scenarios helped lay the groundwork to scale up our operations successfully when a ceiling increase led to increased demand for our services.

HOW TO APPLY THIS LESSON:

- ✓ **Look forward, engage in active listening, be adaptable, and always seek to innovate and lead thoughtfully.** This approach can help organizations not only respond to immediate needs but also build structures and services that are robust and flexible enough to handle future challenges and changes.
- ✓ **Anticipate the needs of stakeholders.** Position a team member or organization as a thought leader by staying ahead of the curve and anticipating stakeholder needs. Provide recommendations and plans that show an understanding of the broader context and future directions.
- ✓ **Expect the unexpected.** Develop flexible contingency plans so that the team can adapt to unexpected changes or uncertainties. Strive to offer solutions before problems arise, demonstrating preparedness and resilience.
- ✓ **Engage in continuous futures thinking and adaptation.** Use insights from futures thinking to reimagine processes and services. Position adaptive services to meet changing needs and circumstances, such as the swarming behaviors (a.k.a. hotspot servicing) mentioned.

4 PRACTICE 4: See ambiguity in a positive light.

Background:

Being comfortable with ambiguity is required to succeed as a government contractor because sometimes guidance, funding, and direction can be unclear. Anyone going into government contracting should expect some "fuzziness," particularly regarding project startup, closeout, extensions, and rebids. Things can get stuck in the bureaucracy, and patience is required. These moments of ambiguity are opportunities to advocate for a project's importance and contributions. Ambiguity can create space for creativity in the absence of clear directives.

Our experience:

The Partnerships Incubator began just before the start of the COVID-19 pandemic. In the early months of the pandemic, ambiguity was the global norm. Global priorities were shifting, and personal and professional life was evolving rapidly. Even during that time, the Incubator continued to deliver on its objectives.

In periods of uncertainty, the Incubator worked to make itself essential and continuously provide services. This proved our value to the client and supported the project's continuation. An essential component of our success was demonstrating to the Agency what was possible to help them see the full potential of the Incubator pilot.

For example, before the project's extension in Year 4, project leaders engaged in scenario planning to prepare the team for various possibilities. Leaders proactively met with team members to share information and share related job opportunities. This helped the team feel secure enough to avoid searching for new jobs and wait until the extension had been announced, helping to avoid staff attrition, which might have weakened the project.

The uncertain project programming resulting from the extension delay required heightened flexibility. In the case of the Incubator, flexibility and the ability to discern direction based on ambiguous or limited information were hallmarks of the project, and our USAID counterparts greatly appreciated them.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Embrace ambiguity to leverage it.** Encourage a mindset that sees ambiguity not as an obstacle but as an opportunity for growth and learning.
- ✓ **Foster an environment of transparency where information is freely shared.** This approach reduces anxiety and equips team members to handle shifts effectively.
- ✓ **Regularly envision and prepare for multiple future scenarios.** This forward-thinking practice helps a team stay one step ahead and be ready to adapt to changes.
- ✓ **Make a project's contributions indispensable by identifying and filling gaps, especially when conditions are uncertain.** This proves a project's worth and secures its position within the client's established ecosystem.
- ✓ **Build a team and process that can pivot quickly.** Flexible strategies and nimble responses can turn potential crises into showcases for your project's agility and relevance.
- ✓ **Use periods of ambiguity to challenge the status quo and explore new ideas.** Without the constraints of rigid plans, a team can think outside the box and uncover creative solutions.

PARTNERSHIP

Strong, viable, sustainable partnerships were at the heart of the Partnerships Incubator. Effective partnership encourages stakeholders to learn from each other's experiences and expertise and work effectively with each other and external collaborators to solve problems, maximize opportunities, and achieve project success. In the following pages, we describe four lessons learned and two best practices that relate to partnership:

LESSONS LEARNED

1. Provide simultaneous interpretation to enable language inclusion.
2. Build trust through early in-person consultations.
3. Check in regularly to identify support issues and course-correct early.
4. For successful capacity strengthening, promote technical capacity and connectivity.

BEST PRACTICES

1. Aim for sustainability that endures beyond USAID partnership lifespan.
2. Clearly communicate what USAID expects of partners.

LESSONS LEARNED

1 LESSON 1: Provide simultaneous interpretation to enable inclusion.

Background:

Language barriers can pose significant challenges in the international development context. Simultaneous interpretation during events and conversations bridges these gaps, allowing for real-time translation of spoken content. It is essential for effective communication and collaboration. With simultaneous interpretation, project leaders make it possible for participants, regardless of their native language, to be included and engaged in discussions, decision-making, and capacity strengthening.

The Lesson:

Sometimes, our partners spoke only conversational English or no English at all. Even conversational English speakers struggled with technical terms—especially USAID terminology. Meetings and discussions in these cases were far less productive than required to effectively engage, define expectations for services and outcomes, and draw out critical insights to support valuable support delivery.

During the early stages of the Partnerships Incubator, our bilingual staff attempted to support partners; colleagues with applicable language skills joined meetings to assist with interpretation. However, because they were not professional interpreters, translation had to be done sequentially rather than simultaneously. This not only doubled the time required for every meeting, but but it also pulled the Incubator interpreter away from other important responsibilities.

The Pivot:

In Year 3, as the need for interpretation services expanded, we conducted a competitive procurement process to secure a simultaneous interpretation vendor, Boostlingo. Its services made an immediate and significant difference in engagement levels among local partner clients. The services allowed non–English speakers to contribute more actively and understand project materials and discussions without delay. This improved the quality of their input and fostered a sense of belonging and respect among partner stakeholders. Apparently, when participants felt heard and understood, their cooperation and contribution increased significantly.

HOW TO APPLY THIS LESSON:

- ✓ **Assess the language requirements of all participants.** This will help identify any need for interpretation services.
- ✓ **Hire skilled simultaneous interpreters.** Service providers should be proficient in relevant languages. Provide technical terminology to prepare them to assist with technical discussions.
- ✓ **Prepare interpreters.** In advance, provide necessary materials such as project documents, glossaries, and meeting agendas so interpreters can prepare for accurate translation.

2 LESSON 2: Build trust through early in-person consultations.

Background:

Conducting in-person consultations from the beginning of a project can accelerate progress and build trust. Face-to-face interactions are the cornerstone of any robust foundation of trust, which is critical for accelerating progress and solidifying partnerships. The nuances of body language, the immediacy of feedback, and the personal touch of a handshake cannot be replicated through a screen. When partners meet face-to-face, the exchange goes beyond words; it fosters a sense of mutual respect and understanding. This shared experience can quickly align visions, clarify objectives, and set the tone for a collaborative journey. Applying this lesson is both an art and a science. Making in-person consultations an integral part of an engagement strategy sets the stage for a more trusting and productive partnership, paving the way for successful outcomes and lasting impacts.

The Lesson:

When budget allowed, the Partnerships Incubator preferred to meet with partners in person to discuss their organization's goals and aspirations, challenges faced, and how our support could be most valuable. In the case of one Dominican Republic partner, virtual discussions led to a breakdown in client-partner communications and a support package that addressed the wrong issues. When the Incubator project director began delivering the planned support in person, she discovered different root causes of the partner's performance issues. In this case, the planned support would not address the issues that had been identified remotely. The trust and rapport established in person allowed the partner to reveal very different details from those it was willing to reveal virtually.

The Pivot:

Throughout our engagements with partners, we consistently observed that projects beginning with in-person consultations tended to reach their stride more swiftly than those relying solely on remote communication. These initial in-person meetings allowed both parties to establish trust and rapport, engage in open dialogue, and address concerns directly. As a result, we could drill down to the actual needs of the partner and the most valuable Incubator services much earlier in our engagement.

HOW TO APPLY THIS LESSON:

- ✓ **Schedule in-person meetings with key stakeholders at the project's outset.** This establishes a strong working relationship from the start.
- ✓ **Use a semi-structured approach to meetings to build relationships.** Go into each meeting with clear objectives, background information on the stakeholders, and an agenda allowing open-ended discussions.
- ✓ **Use the consultation to listen and engage with the partner's perspectives truly.** Show genuine interest in leaders' and staff members' views and concerns.
- ✓ **End each meeting with a clear plan for follow-up actions.** This demonstrates commitment and reliability. Send a summary of discussion points and express appreciation for the time spent together. Quickly following up on actions reinforces trust and respect.
- ✓ **Encourage a two-way dialogue.** This creates an environment where both parties feel comfortable sharing insights, challenges, and opportunities.
- ✓ **Maintain a strong connection as the project progresses.** Make this a priority, even when shifting to remote communications.

3 LESSON 3: Check in regularly to identify support issues and course-correct early.

Background:

To be effective, capacity-strengthening initiatives must be highly responsive to partner organizations' needs and constraints. A strong capacity-strengthening program must also consider a partner's readiness and capacity for absorbing guidance and adopting organizational change.

The Lesson:

The Partnerships Incubator planned a valuable but ambitious program of technical assistance to support a cohort of U.S.-based Minority Serving Institutions (MSI). We identified many capability gaps we could address to improve the organizations' preparedness to partner with the Agency, but we had limited time to address those gaps. We wanted to provide as much value as we could, but we were taking too much of the partners' staff time and bandwidth, which hindered their ability to do their daily jobs. Additionally, we ran the risk of low adoption because we introduced too much change without sufficient time for the organizations to assimilate and put changes into practice.

The Pivot:

The Incubator team became aware of this situation through a "pulse check" survey designed to give us a sense of the partners' experience midway through technical assistance delivery. As a result of this realization, when scoping and defining future support programs, the Incubator gave more consideration to the possibility of overfilling bandwidth and overburdening partners. We recognized the pulse checks, whether through brief surveys or discussion during regular partner check-ins, as practical tools to identify support delivery issues early and course-correct within a timeframe, enabling us to serve partners better.

HOW TO APPLY THIS LESSON:

- ✓ **Assess a partner organization's interest and commitment before and during the implementation phases.** This could be done through structured pulse-check surveys or regular check-in meetings.
- ✓ **Aim for a culture and systems that allow continuous feedback.** Do not wait until a technical assistance engagement ends to collect feedback. Collect feedback regularly throughout implementation.
- ✓ **Triangulate the feedback of team members, service providers, and partners.** Use partner check-ins and partner feedback to verify service provider feedback.

4 LESSON 4: For successful capacity strengthening, technical capacity and connectivity is needed.

Background:

Capacity-strengthening initiatives rely heavily on digital tools and platforms for training, collaboration, and project management. Organizations must first build a reliable technological foundation to benefit from these initiatives. This includes the necessary hardware, such as laptops and smartphones, and stable internet connectivity. Without these basic tools, capacity-strengthening support effectiveness can be severely limited. Prioritizing connectivity and technical capacity as a foundational step optimizes coachability and maximizes the benefits of capacity-strengthening support. This, in turn, can lead to more successful development initiative outcomes and a greater overall positive impact in the communities local organizations serve.

The Lesson:

Organizations lacking adequate technological resources faced significant participation barriers in consultations, which made it challenging to learn what we needed to learn from them. They could not engage effectively in online training sessions, access resources and materials, participate in webinars, or maintain consistent communication with mentors and peers. In some projects, the technological gap became a barrier to delivering meaningful capacity-strengthening support. One partner in the Dominican Republic missed meetings and failed to take action on key recommendations. Support progressed slowly until the Partnerships Incubator team realized partner counterparts were attempting to work from their phones; the organization needed laptops or desktop computers.

The Pivot:

We advocated for helping the Dominican Republic partner acquire equipment to begin strengthening capacity, but the setback resulted in the Incubator's inability to accomplish initially planned services. Knowing about the technological impediments early in the engagement could have saved time and frustration.

After our experience in the Dominican Republic, we made a point of conducting a technology assessment of local partners early in each engagement. We surveyed partners about access to computers, phones, internet, cloud servers, etc. Asking partners directly and clearly about their resources permitted them to discuss insufficiencies early rather than waiting for issues to come to light later in the activity. For example, as the Incubator began what was to become a three-year support activity for a local WASH partner in Latin America, through a technology assessment we discovered it had limited windows of internet availability because of government control. We adjusted our processes to engage them at the right times. We also coordinated an offline approach for working on files managing version control without confusion or redundancy.

HOW TO APPLY THIS LESSON:

- ✓ **Assess technological needs of your partners for every project.** In the assessment, include hardware, software, internet connectivity, and technological skills.
- ✓ **Agree on collaborative technology, especially file sharing.** Is the partner comfortable with using the same platforms as the service providers and team members?
- ✓ **Advocate for technological investment.** Work with stakeholders to highlight the importance of technological capacity as a foundation for development and make recommendations for increased investment in this area.
- ✓ **Make adjustments to workflow, if necessary, to accommodate technological challenges.** Identify technology challenges that cannot be fully addressed in the support provision timeframe.

BEST PRACTICES

1 PRACTICE 1: Aim for sustainability that endures beyond the USAID partnership lifespan.

Background:

Sustainability in the context of international development extends beyond the lifespan of a single project or grant. For a USAID partner, true sustainability means having the resilience and capacity to continue delivering on its mission and expanding its positive impact, even after USAID funding ends. Creating sustainability involves building solid systems, diversifying funding sources, and cultivating local leadership and ownership.

By emphasizing organizational sustainability, USAID and its partners can support the continued growth of positive effects of development work, ultimately leading to stronger, more resilient organizations and communities. This aligns with the principles of aid effectiveness and sustainable development, which call for strengthening the capacities of local actors to lead and maintain development trajectories.

Our experience:

At the Partnerships Incubator, we observed that partners who focus on strengthening their organizational capacity and resilience from the outset are more successful in the long term. These organizations are not solely reliant on USAID funds; they have robust financial management systems and strong governance structures. They are responsive to the needs of the communities they serve. Considering their long-term sustainability, these organizations are better equipped to adapt to changes, pursue their strategic objectives, and continue making a difference in their communities.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Encourage partners to create a comprehensive sustainability plan.** This plan should outline strengthening local capacity and leadership. Develop the skills and knowledge of local staff and leaders to improve their strategies for maintaining financial health, human resources, and programmatic success beyond the life of the USAID project.
- ✓ **Help partners strengthen financial systems.** Assist them in establishing solid financial management practices (e.g., budgeting, accounting, and financial reporting) that attract other donors and support self-sufficiency.
- ✓ **Help partners identify and secure diverse funding streams.** These sources can include grants from other donors, government contracts, private-sector partnerships, and income-generating activities.
- ✓ **Invest in local capacity strengthening and local leadership.** Develop the skills and knowledge of local staff and leaders to make it more likely they will be able to manage operations, innovate, and adapt to new challenges without external support.

2 PRACTICE 2: Communicate what USAID expects of partners.

Background:

The role of the Partnerships Incubator involved the nuanced, critical task of evaluating potential partnership success. We proactively engaged with organizations to identify and address any uncertainties about expectations that could affect support provision. To overcome uncertainties and make expectations clear, we first had to have a deep understanding of USAID's structure, operational modalities, and objectives. We also had to nurture an ability to communicate the commitments required of potential partners. For partners, understanding those commitments properly helped clarify the time and effort necessary to pursue opportunities for partnership with the Agency, which influenced their interest in a partnership.

Our experience:

In supporting USAID's Office of Diversity, Equity, Inclusion, and Accessibility (DEIA), the Incubator provided capacity-strengthening services to Minority Serving Institutions (MSI) to prepare them for partnership with the Agency. The Incubator held a call with one MSI to discuss its priority capacity-strengthening needs so we could plan the support program. During the call, it became apparent that while the partner had earlier indicated priority areas for support, its team had not yet reached a consensus regarding the organization's intent to partner with USAID. The Incubator had to decide whether it should move forward, planning and implementing a program of assistance for an organization not committed to partnership with the Agency. Eventually, through discussions involving USAID, the MSI, and the Incubator, the partner's team reached a consensus on its interest in partnering with USAID, and assistance program planning proceeded.

The Incubator worked at the direction and discretion of USAID. Still, it was our responsibility to bring the Agency's attention to any question that could lend uncertainty to the merit of providing support. Deciding the merits of partnership with USAID should be part of the Incubator's early-stage support to organizations.

HOW TO APPLY THIS BEST PRACTICE:

- ✓ **Make initial conversations open-ended, allowing space to address questions or concerns about the partnership.** In the kickoff meeting, include discussions or workshops that allow open conversations about expectations, problems, and level of commitment. This can bring to light any hesitation or misunderstanding that might exist.
- ✓ **Discuss the partnership expectations of both parties upfront.** Work toward ensuring that both sides of the partnership understand what is expected of them. This mutual understanding is fundamental to successful collaboration.
- ✓ **Be clear about the partnership's benefits and obligations.** Provide potential partners with comprehensive information about the partnership's benefits and obligations. This helps organizations make informed decisions about their involvement. Recognize that part of the support may involve assisting organizations to weigh the pros and cons of a partnership before any other services are provided. Be prepared to assist in this analytical process.
- ✓ **Document the partnership agreement and commitment from all parties involved in the discussions.** It is important to create a tangible record of mutual understanding.
- ✓ **Revisit the commitment continuously as the partnership evolves.** This is particularly important during major transitions or when context changes. Address any uncertainty promptly to avoid misaligned expectations hindering the partnership's progress.