



Photo: Morakot Theparathip/TTI

HIGHLIGHTS

- Establishing relationships of trust between a program officer and senior leaders in organizations takes time and has costs. However, these costs yield significant value down the line.
- The skills program officers require to accompany organizations are different than those required to oversee research projects.
- Reflecting on and documenting the contribution program officers make through accompaniment can be difficult, but it is important for their own learning, and for communicating how accompaniment works.

Supporting Change Through Effective Program Officer Accompaniment

TTI Insights distill ten years of learning from the Think Tank Initiative (TTI) to inform donors, researchers, and organizational development practitioners working to strengthen policy research. Here, we discuss insights gained from our program officer accompaniment model. Each organization receiving core support was assigned a program officer to oversee the grant. They provided tailored support, negotiating the tailored organizational advice based on the experience of other organizations, based in part on the comprehensive organizational assessments they had done prior to selection. This involved annual face-to-face meetings and regular communication via phone and email. Conversations were both structured - with all members of a senior management team, and informal — including conversations with the Executive Director involving friendly and constructive criticism or advice.

What's at stake?

Core funding, given to support the capacities of organizations required to deliver on their missions and mandates, is often held up as the gold-standard modality when looking to strengthen organizations. When provided flexibly and over the long-term, core funding puts organizations and their leaders in the driver's seat, giving them the ability to invest in their organizations strategically in ways that make sense to them, and providing the cushion to withstand unexpected events. However, there are other critical ingredients to help organizations make the most of core funding. For funders, one of the most effective is to make available the right kind of support and advice from a program officer who can accompany an organization on its journey.

As a feature of accountability, every funding institution has program officers or dedicated staff to oversee the funding provided to organizations and individuals. And yet, there is not much written on how this relationship should work in practice.¹ Given the critical role of program officers in supporting organizational strengthening processes, how can they balance their accountability responsibility with other contributions they are expected to make? What are some of the challenges they can expect to face and how should they handle them?

TTI was implemented by the International Development Research Centre (IDRC), whose programming model centres on assigning program officers with regional knowledge and expertise to its regional offices in South Asia, sub-Saharan Africa, South America and

the MENA region. In the case of TTI, eight regional program officers based out of the IDRC offices in Uruguay, Kenya and India provided support to a cohort of 43 organizations. Their experiences and reflections yield valuable insights.

What have we learned?

TTI's evaluators confirmed that the accompaniment of IDRC regional program officers made a significant contribution to the success of the Initiative:

A central but somewhat intangible aspect of the intervention has been the accompaniment and advisory role of the regional program officers (RPOs) in their regular engagement with the grantees. It cannot be emphasized enough that, without the continuous contact between grantees and RPOs, the overall TTI approach would not have been viable (p. 27).²

In this context, there are two important lessons for funders looking to encourage effective accompaniment by their program officers.

1 Establishing trust takes time and comes with a cost, but the cost is ultimately worth it.

TTI program officers acted as friendly but critical advisors to the organizations they supported, and through these trusted relationships, they were able to advise and guide organizations through challenging moments or periods of organizational change. While critical, these relationships were not established overnight. Over the course of TTI most regional program officers spent over five years supporting and

building relationships with the same organizations and, in several cases, they accompanied organizations for the full ten years of the Initiative.

The length of accompaniment was critical in allowing all parties to develop mutual trust. In turn, this trust allowed program officers to have necessary but difficult conversations with the organizations they were assigned to. In multiple instances, organizations faced challenges in growing or undertaking internal reforms. For example, there were several instances where think tank founders and Boards had competing visions of where their organizations should go and how they should get there. Acting as trusted third parties, program officers were able to speak difficult truths and help move the organization's leaders beyond disagreements to viable ways forward. With the benefit of hindsight, leaders in these organizations were unanimous in acknowledging the contribution that program officers played in helping them overcome these difficulties. They knew that the program officers had the organization's best interests at heart. Even though they depended on program officers to release their grant payments, the quality and depth of the relationship that developed over time minimized the power imbalance at the heart of the funder-organization relationship. Through such an approach, program officers were able to achieve a healthy balance between learning and accountability.

Of course, establishing these relationships requires that program officers have the space and means to do so. Program officers' workloads were therefore established with an idea of how much effort would be needed to support each organization. Certainly, some organizations required more time than others, but this was difficult to know when the program was initiated. Some workloads were adjusted as a better understanding of required efforts was gained. For TTI, program officers supported on average 7-8 organizations each.³ In TTI's case, most program officers visited organizations once or twice a year for extended face-to-face meetings and stayed in regular touch with their counterparts over the phone or via email.

In the course of supporting individual think tanks, program officers were also looking across the TTI program to identify opportunities that could help organizations learn and seek out other, new opportunities - whether for funding or training.



TTI had mechanisms such that program officers could access or build on to respond to these opportunities. These included Opportunity Funds which came in the form of additional funds for research or organizational strengthening projects; regional and global peer learning events; and action learning projects (for examples, please refer to the [TTI website](#)).

2 The skills program officers require to accompany organizations are different than those of program officers who oversee research projects.

Program officers accompanying organizations often played a slightly different role than program officers overseeing research projects. The nature of organizational change processes meant TTI program officers dealt regularly with the senior leadership of organizations: Executive Directors, members of governing bodies, Directors of research and Heads of corporate units like finance, HR and administration. Although there is a power imbalance between funders and the organizations they fund at an institutional level, at a personal level, this power imbalance can be flipped. Senior leaders of organizations often tend to be distinguished individuals well known in their countries (former Ministers, senior business leaders) while program officers are often younger outsiders. Good accompaniment is easier when there is an openness and willingness of an ED to be accompanied and learn, and a humility to accept that they may not know all the answers. To establish good relations and accompany organizations well means program officers must navigate these contexts and power dynamics carefully. To be able to have frank conversations and potentially draw attention to leadership blind spots requires considerable tact and self-awareness.

This speaks to the importance of having program officers with general knowledge and awareness of good organizational practices, governance, financial and administrative systems; an ability to “read” and navigate relationships in diplomatic ways; and competencies in looking across contexts and organizational settings to identify useful points of comparison and other organizational practices of interest. Accompaniment also requires achieving a balance between being sympathetic to the challenges organizations face without being “captured” by the organizations themselves, and still being able to carry out the accountability function in a firm but fair way.



Photo: Think Tank Initiative Exchange 2012

Recruiting individuals with these competencies and skills is not easy, and you can never know in advance how staff will fare when faced with some of the challenges accompaniment presents. But with a supportive team and mechanisms to share experiences and build peer support, program officers can develop the appropriate blend of confidence and humility that seems to work well in trusting and productive relationships with think tank leaders.

3 Documenting a program officer's contribution can be difficult but is important for many reasons.

A third lesson speaks to the value that comes from trying to document accompaniment as a practice. Evaluators noted accompaniment as an “intangible” contribution. Program officers themselves sometimes struggled to describe what they did, as it became so ingrained, and the humility that made them effective at accompaniment made it difficult to draw out their own role in the organizational change process.

While difficult, documenting this contribution is critical for several reasons. The costs of accompaniment need to be justified. Yet the nature of this contribution makes it harder to put a “value” on it, especially when the intention is to enable the organizations themselves.

Documenting reflections on the practice of being a program officer also helps improve the practice of accompaniment. Just as organizations performed and grew most effectively when there was strategic intent to their efforts, so too do individuals improve in their work when they reflect on their role and are deliberate in translating these reflections into practice.

TTI sought to encourage program officers to undertake these processes of reflection in ways that made sense to them. They had the opportunity to write blogs about their work.⁴ They came together once a year to discuss program implementation and think about what we were learning in the process. They also followed IDRC's internal monitoring and learning mechanisms as part of its regular project completion reporting, and participated actively in the external evaluation, which also created opportunities for reflection. And they were encouraged to connect with each other on a regular basis to share experiences. Despite this, conventional measurements of development support have not yet developed sufficiently nuanced ways of monitoring and evaluating these kinds of contributions.

Putting Lessons in Practice

Effective accompaniment by good program officers is a critical dimension of organizational strengthening and can go a long way toward ensuring the most effective use of core funding. The evidence from TTI on this score is clear. What should the donor community take forward from this lesson?

A common feature that comes out is time: the time it takes to establish trusting relationships, to achieve organizational strengthening outcomes, for

strengthened organizations to make contributions to policy and practice, and for these contributions to help realize development outcomes. Program officers cannot work effectively on organizational strengthening if the project timeframes are too short.

Accompaniment as an approach amongst funders seems to be an under-documented practice. This has to change. Program officers should be encouraged and supported to establish communities of practice that help them reflect on the kinds of challenges that accompaniment presents. As a practice, accompaniment is never going to be something that can be learned from a manual, only through experience. Documenting these experiences and perspectives is important. Even so, program officers will still need the freedom to learn in other ways, and the latitude to fail.

Organizational change is ultimately driven by individuals. Accompaniment recognizes that program officers can participate actively in these change processes. There is value therefore for think tanks and funders to discuss accompaniment more explicitly at the outset and find ways to make the most of accompaniment. This will make everyone's work easier and should ensure a partnership that is productive and contributes to goals of mutual interest.

- 1 Vuyiswa Sidzumo (2018). The Dilemmas, Contradictions, and Excitements of Being a Foundation Program Officer. <https://cep.org/the-dilemmas-contradictions-and-excitements-of-being-a-foundation-program-officer/>
- 2 *External Evaluation of TTI Phase Two Interim Report*, 21 June 2016. Allerød: NIRAS
- 3 Three program officers combined their TTI responsibilities with responsibilities for managing research projects from another program. In these cases, these "shared" POs supported two organizations each.
- 4 See blog by Samar Verma (<http://www.thinktankinitiative.org/blog/adolescence-adulthood-managing-growth-think-tanks>) & blog by John Okidi (<http://www.thinktankinitiative.org/blog/does-core-funding-matter-reflections-tti-support-east-africa>)

*The **Think Tank Initiative** helped strengthen policy research organizations in 20 developing countries across South Asia, sub-Saharan Africa and Latin America. Launched in 2008 and managed by Canada's International Development Research Centre (IDRC), TTI was a partnership between five donors.*

www.idrc.ca/en/initiative/think-tank-initiative

