Inclusive Markets Institute
Education for Professionals that Influence Change

Adapting to Complex Markets
ONLINE COURSE SYLLABUS
September 4 – December 15, 2017

COURSE OBJECTIVE

To provide market development professionals the opportunity to learn and apply systems thinking while practicing adaptive management when working in the field of inclusive market development.

COURSE DESCRIPTION

The labor, commodity and service markets where vulnerable populations participate as producers, employees or consumers are dynamic and forever changing as a result of unpredictable shocks and external factors to the market system. Facilitating systemic change to ensure that the most vulnerable can participate and benefit from participating in markets cannot be confined to a linear process of developing an intervention and implementing it. The constant changing landscape of a market requires us to be responsive to the changes and adapt our approaches in order to influence systemic change. *Adaptive Management requires knowledge and a new set of skills if we are going to facilitate systemic change in markets that benefits and includes the most vulnerable.*

This course offers a guided learning experience that allows market development professionals to apply their learning to problem solve on-the-job in their own context. Participants will take a key organizational or management issue to learn, experiment and adapt in real time through an action learning assignment based on an issue the participant is facing in their current employment situation. The learning from the course will be simultaneously tested and applied in the field while they are connected to a learning community where they can engage in discourse, share, question and problem-solve with peer support and market development experts

This course will be conducted solely online to enable professionals to work while they are simultaneously engaged in this learning process. Instructional videos and coaching, along with peer group work, and online group discussions are some of the methods of engagement to be employed. Each module will explore a theme, through articles and video clips. To deepen the learning, participants will work in small groups reviewing case studies and engage in online discussions. Participants will gain valuable problem solving skills that can be applied to any position and learn the essentials of adaptive management.

LEARNING OUTCOMES

By the completion of this course, participants will be able to:
1. Design & implement an adaptive management approach including how to:
   - Articulate and pose a clear management or organizational problem regarding the uncertainty in the system
   - Develop appropriate tools to solicit feedback.
   - Critically reflect and analyze the qualitative data collected
   - Adapt interventions and/or management activities in response to the feedback received from market actors in a timely manner
2. Explain the elements of a market system (input, output, processing, feedback, delays, boundaries, environment, interconnections, leverage points)

3. Describe complex adaptive system properties within a market system (emergence, self organization and adaptation)
4. Identify emergent patterns and effective leverage points to stimulate market development

PREREQUISITES

- Inclusive Market Development Practitioners with at least 2 years of work experience in the field
- Have received some basic training in M4P or the Value Chain Approach
- Currently working on a project engaged in inclusive market development as a middle or senior manager
- Consultant or advisor to a team currently working on a market development project in the area of programme design, management, evaluation or coordination

MONITORING & EVALUATION

Each learner will be rigorously assessed on the outcomes according to the following outcome groups:

	% of Overall Grade			
	Research/Inquiry Assignments	Skill exercises	Contributions to Discussions & Webinars	Critical reflections
Module 1		4	7	
Module 2	15	9	5	2
Module 3	15	7	5	2
Module 4	20	4	3	2
Total	50	24	20	6

The Field Research/Inquiry, which involves three assignments, makes up 50% of the overall grade. Emphasis in the course is on skill-building with case studies, readings, webinars and conceptual frames used to deepen understanding of practice. Each module of the course is related to and builds on the previous module as illustrated below in the Course Overview..

Other means of evaluation include: a pre and post assessment of key skills and knowledge areas; quizzes, participant feedback during and post-course; facilitator reflections.

STUDENT FEEDBACK

During the course students will have access to the instructor throughout the entire course, and are encouraged to communicate their concerns. Skype calls are also available to support the online environment.

Students will have the opportunity to provide feedback on the course following each module. The instructor will apply feedback input to the subsequent module regarding delivery and interaction. There will also be a formal evaluation of the course at the end of the online portion. In addition, eight months following the course, a selected number of students will be invited to provide focus group feedback on the impact of the course.

A Note on Online Learning, Participation and Inactivity

The benefit of online learning is that participants are embedded in life and work. The challenge of online learning is that participants are embedded in life and work. Inactivity online is a bit more difficult to detect particularly in a mainly asynchronous environment due to differing time zones. Inactivity for the purposes of this course is no activity of any kind (reading, contribution or checking in online) for two weeks. In the first two modules, participants will be called. Following that, automatic emails will be sent notifying participants. There is some flexibility, as it is understood that emergencies arise. However, it is the professional responsibility of the participant to forewarn the facilitator and provide alternative(s) to ensuring that outcomes of the course are met. Failure to do so will result in poor grades, failure and a poor reference.

PARTICIPATION POLICY

We recognize that participants are usually employed full-time; nonetheless we expect them to participate to the best of their ability in the online course. Participants are expected, on average, to dedicate between 5-10 hours a week to the course though the amount dedicated may fluctuate each week.

Participants are asked to let instructors know, prior to the start of the course, when they will be away so that their absence is not unexpected. If they are called away to the field unexpectedly during the course and will not be able to log in for some time, they must notify the course facilitator.

If a participant has not logged on (neither viewed nor posted) **in more than 10 days**, they receive an email from the facilitator. If this happens more than once, they are given a warning that they will be removed from the course due to inactivity. The third time they have not logged on for more than 10 days without any contact with the instructor they are removed from the course and receive a grade of Incomplete.

MODULES

Each module will include an introduction, objectives, discussions, readings, instructional videos and small group peer exercises to deepen and apply what has been covered in the module. The modules will be available upon completion of the previous module. In this way, distance learning allows learners the flexibility to go at their own pace and to customize their learning. Provided learners meet the requirements of participation in discussions and exercises, they are free to do the modules in the order that suits them and their work schedules. The expected level of effort is roughly 5-7 hours per week but there is flexibility how that is done. Students from previous courses suggest dedicating an hour every evening to the course.

COURSE OVERVIEW

Module 1 Introduction- 3 weeks September 4-22, 2017	
Topics	**Activities**
Creating online community & Becoming Familiar with Canvas	• Moderated Discussion: Introduce yourself, sharing tools & frameworks • Getting to know Canvas: hands on exercises
Inclusive Market Systems	• Article with questions: Campbell, R.,2014. *Framework for Inclusive Market System Development* [online]. Washington, DC: USAID. • Educational Video
Conceptual Foundation for Course	• Webinar: What is a market?; Overview of a system; Elements of a value chain; Difference between a value chain and a market system; Distinction between simple, complex & complicated markets
Module 2: Markets as Systems-4 weeks September 23 – October 22	
Topics	**Activities**
Systems Elements: Boundaries & Environment; Feedback & Leverage Points	Instructional Videos & Quiz
Systems Thinking: patterns, symptoms & root causes of market failure	Review Case Studies in Small Groups
Lessons Learned from feedback loops	Moderated Discussion
Articulate a clear management or organizational problem	Assignment #1 Guide & Coaching
Critical Reflection	Receiving & Giving Feedback with colleagues
Overview of Systems Elements & Article Review	Webinar

Module 3: Markets as Complex Adaptive Systems – 5 weeks October 23 – November 24	
Topics	**Activities**
Complex Adaptive Systems Elements: Self- Organization, Emergence, Adaptation	• Instructional Video & Quiz • Small Group work with case studies
Qualitative Tools & Frameworks to develop feedback mechanisms	• Articles & Webinar o Frameworks: USAID 5 Rs; Springfield Adopt-Adapt-Expand-Respond o Tools: After Action Review, Anecdote Circles, Empathy Walk, Strategy Testing • Virtual Coaching
Research Plan & Tools	Assignment #2
Lessons from Systems that Adapt	Moderated Discussion
Critical Reflection	How have you influenced systemic change for better or worse

Module 4: Adaptive Management 4 weeks November 25 - December 15	
Topics	**Activity**
Sense making of data	Webinar – how to analyze qualitative data
Creating a learning environment with colleagues & subordinates	Moderated discussion where students share how they propose to implement adaptive management
Support and Feedback to final Assignment	Coaching
Emergence & Adaptation	Assignment #3– Synthesis & Analysis of field work

INSTRUCTOR

Mary Morgan
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Mary Morgan has been involved in human rights and economic development work since 1986. Recognizing early on that having the opportunity to earn an income is a basic human right, Mary's work morphed from human rights into microfinance and then market development. She has worked with CARE, Katalysis Partnership, SEEP, Katalysis, CIDA, UMCOR, IRC, ARC, MEDA, IFC-SEDF, ACDI/VOCA, IDE, Omidyar Network, Mercy Corps, Aid to Artisans, Street Kids International, as well as various other organizations.

Employing participatory techniques, Mary has been successful in transferring knowledge and building capacity with professionals facilitating systemic change in markets that include vulnerable populations as suppliers and consumers. Her work has spanned the globe.

Mary is committed to making economic development accessible and doable so that everyone can understand how markets operate, whether they are market development practitioners, senior managers or those that have been disenfranchised themselves. This work is her way of contributing towards social change. She is committed to making knowledge accessible, inspiring curiosity to discover how structures influence market behavior, and to pay attention to feedback from market systems so professionals can adapt to influence what is, instead of holding on to what is suppose to be.

CONTACT INFORMATION FOR THE INCLUSIVE MARKETS INSTITUTE

Any Questions? Feel free to contact us!

E-mail: info@inclusivemarkets.institute

Website: www.inclusivemarkets.institute

Articles

Benner, A. & Benner, D., 2008. The Decision-Making Process for Complex Situation in a Complex Environment. In: BURSTEIN, F. & HOLSAPPLE, C. W., eds. Handbook on Decision Support Systems 1: Basic Themes.   Berlin, Germany: Springer-Verlag, pp. 3-20, Available from http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.158.4559&rep=rep1&type=pdf

Bowman, K., Chettleborough, J., Jeans, H., Rowlands, J. & Whitehead, J.,2015. *Systems Thinking: An Introduction for Oxfam programme staff* [online]. Oxford, UK: OXFAM. Available from: http://policy-practice.oxfam.org.uk/publications/systems-thinking-an-introduction-for-oxfam-programme-staff-579896

C.F., K. & Snowden, D., 2003. The new dynamics of strategy: Sense-Making in a complex and complicated world. *IBM Systems Journal* [online], 42 (1). Available from: http://alumni.media.mit.edu/~brooks/storybiz/kurtz.pdf

Campbell, R.,2014. *Framework for Inclusive Market System Development* [online]. Washington, DC: USAID-Leveraging Economic Opportunities (LEO). Available from: https://www.microlinks.org/library/framework-inclusive-market-system-development

Hummelbrunner, R. & Jones, H.,2013. *A guide to managing in the face of complexity* [online]. London: ODI. Available from: https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/8662.pdf

Jenal, M. & Cunningham, S., 2013. Gaining systemic insight to strengthen economic development initiatives. Drawing on systems thinking and complexity theories to improve developmental impact. *Mesopartner Working paper 16* [online], Available from: http://www.mesopartner.com/fileadmin/user_files/MP_WP_16_Gaining_systemic_insight.pdf

M4P Operational Guide, 2014. Can be accessed: http://www.beamexchange.org/en/resource-detail/resource/167/

Meadows, D.A.,2008. *Thinking in Systems- A Primer* [online]. White River Junction, Vermont: Chelsea Green Publishing. Available from: http://www.ess.inpe.br/courses/lib/exe/fetch.php?media=wiki:user:andre.zopelari:thinking_in_systems_a_primer.pdf
- Leverage Points-Places to Intervene in a System. Pp. 145-165
- Living in a World of Systems, pp 166 – 185

Nippard, D., Hitchins, R. & Elliot, D.,2014. *Adopt-Adapt-Expand-Respond: a framework for managing and measuring systemic change processes. Briefing Paper.* [online]. Durham, UK: Springfield Centre. Available from: http://www.springfieldcentre.com/wp-content/uploads/2014/06/2014-03-Adopt-Adapt-Expand-Respond-Briefing-Paper1.pdf

Ripley, M. & Jaccard, S.,2016. *The Science in Adaptive Management.* [online]. Geneva: ILO. Available from https://beamexchange.org/uploads/filer_public/96/6b/966b533e-e213-4685-a0b5-5363519bad06/science_adaptive_management.pdf

Ripley, M. & Nippard, D.,2014. *Making Sense of 'Messiness': Monitoring and measuring change in market systems: a practitioner's perspective* [online]. Durham, UK: Springfield Center. Available from: http://www.springfieldcentre.com/wp-content/uploads/2014/03/2014-02-Making-Sense-of-Messiness1.pdf

USAID,2016. *Technical Note: The 5Rs Framework in the Program Cycle* [online].   Available from:
https://usaidlearninglab.org/sites/default/files/resource/files/5rs_techncial_note_ver_2_1_final.pdf

Video Clips
Complexity Lab Video Clips:
Introduction to systems thinking (good overview of reductionism and systems thinking):
https://www.youtube.com/watch?v=AP7hMdnNrH4&list=PLsJWgOB5mIMC-frJibreOD-dybR2JPNMN&index=1

Complex Adaptive Systems video:
https://www.youtube.com/watch?v=rl0yFwcGx_o&index=5&list=PL_hvEmhK9i7AIKy8V4H0VJaNV6yBlVj0j

Self Organization video:
https://www.youtube.com/watch?v=BTR17I_Eb_o&index=6&list=PL_hvEmhK9i7AIKy8V4H0VJaNV6yBlVj0j

Oxfam: Systems Thinking. https://www.youtube.com/watch?v=WfyWgp95kgA&feature=youtu.be

Podcasts
Development drums Episode 33: Complexity and Development, ODI development Drums,
http://developmentdrums.org/627
  - Transcript of podcast: http://www.owen.org/wp-content/uploads/Development-and-Complexity-Slides.pdf

Development drums Episode 43: Complexity, ODI. Discussion with Ben Ramalingam and Stefan Dercon, Chief Economist with DFID, http://developmentdrums.org/860

Adaptive Management
http://www.beamexchange.org/en/webinar/adapt_webinar/

Blogs
Duncan Green from Oxfam's blog- From Poverty to Power has several blog posts on complex systems that can be sourced from this link:
https://oxfamblogs.org/fp2p/?s=complex+systems

Webpages
Value Chain Wiki –USAID Microlinks
https://www.microlinks.org/good-practice-center/value-chain-wiki

Technoserve: What is a market system?
http://www.technoserve.org/our-work/how-we-work/what-is-a-market-system

Donor Committee for Enterprise Development (DCED) Knowledge Portal
http://www.enterprise-development.org/page/psd-approaches

BEAM Exchange
https://beamexchange.org/