

## Learning Report

# Learning from responsiveness to a rapidly evolving context: IDRC's Covid-19 Responses for Equity programme

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## Overview

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This report summarises key institutional lessons that emerged from a Learning Journey commissioned by the International Development Research Centre (IDRC) for its Covid-19 Responses for Equity (CORE) programme. Learning Journeys are a research method developed by the Institute of Development Studies (IDS) to support collaborative scoping processes and provide participants with structured spaces to learn, discuss issues, and to reflect on their day-to-day work and how to apply learning.

CORE was designed as a rapid response mechanism to address the sudden global shifts caused by the Covid-19 pandemic. The initiative supports 21 research projects with Southern partners across 42 countries. It seeks to understand the socioeconomic impacts of the pandemic, improve existing responses, and generate better policy options for recovery. The CORE Learning Journey was managed by the 'Knowledge Translation' (KT) supplier for CORE, the UK-based IDS. It brought together grantees, IDRC senior management, Regional Directors (RD), Program Officers (PO), and IDS staff, to share experiences and reflect on the successes and challenges of the CORE programme. It was framed around a central learning question:

***What are the key lessons to emerge from the IDRC experience of funding CORE as a responsive mechanism to provide innovative Southern-led policy and practice solutions in the context of a rapid onset and rapidly evolving global crisis?***

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Nine lessons emerged of specific relevance to funding agencies that support rapid response mechanisms in crisis contexts:

1. Unstable policy contexts challenged assumptions around policy influence.
2. Timing was a crucial factor in mobilising funding.
3. Trade-offs existed between speed and risk management.
4. The broad thematic focus supported flexible grants.
5. IDRC strengthened a cohort of grantees by building on previous investments.
6. Effective exchange and coordination require a cross-divisional approach.
7. The global scope of the response delayed regional coordination.
8. Grantee capacity to address the gender aspects of the crisis differed.
9. Grantees valued peer learning to support the responsiveness of their work.

## Introduction to key lessons

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In crises, timing is crucial. Policymakers need credible information from regional aggregators more than from a plethora of individual organisations. Global organisations take time to react, so it is important to both be a credible voice and provide rapid and relevant information to decision-makers. CORE was designed to fill a knowledge gap and mobilise quickly to deliver social science research that responded to the global need to understand the socioeconomic impacts of the pandemic on marginalised populations. Reflections were gathered from participants on lessons learnt and recommendations for future rapid response mechanisms.

*“CORE is possibly unique in its attempt to generate a rapid social science response. Mechanisms exist for rapidly mobilising in the face of health crises, but not in terms of the socioeconomic impact.”*

Senior manager, IDRC

The Learning Journey found that IDRC was quick to anticipate the scale of the crisis, the impact of the pandemic on vulnerable groups, and the vital role that social science research would play. CORE was unique in its specific emphasis on working through Southern think tanks, rather than through longer-term institutional partnerships with large universities.

The CORE initiative generated specific lessons on the design and delivery of a responsive funding model that are central to this report. Many of the emerging lessons highlighted institutional challenges, trade-offs, and choices that are relevant to other funding agencies seeking to develop effective rapid response mechanisms. In the interests of knowledge sharing with the wider donor sector, nine key lessons are set out in detail below.

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## 1. The pandemic created a highly unstable political and policy context which challenged CORE's underlying assumptions on policy influence.

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The Covid-19 pandemic created an unprecedented demand for evidence to inform decision-making in rapidly shifting contexts. Yet, political and policy spaces were also highly unstable. Policy priorities were often reactive in the face of public or media pressure and influenced by new or different types of interests. Shocks like the pandemic are not generally one-off, but accumulative and constantly shifting, creating a need to balance rapid response mechanisms that address short-term priorities with engagement around a longer-term vision (e.g., to build back better).

During the pandemic, policy engagement mechanisms had to adapt and evolve to restrictions creating challenges in building or sustaining relationships with policymakers but also new opportunities and modalities to communicate and share evidence. For example, the universal shift to online webinars and convening may have increased the international visibility and reach of evidence, but it also limited opportunities to build relationships and reflect on how emerging evidence responded to immediate policy priorities. There is still much to learn about how to create spaces for ongoing dialogue and interaction virtually and remotely.

*“Impact is not always lobbying decision-makers or changing policy. Impact may be more through raising awareness, raising the discussion, empowering communities, capacity building, engaging large-scale communities – creating guidebooks, toolkits, speaking to activists and grassroots at a larger scale.”*

Grantee

CORE had an open and flexible approach to design which gave researchers the space to listen to policymakers and respond to the emerging policy issues. The ability of individual projects to do this depended on how connected the grantees were to policy spaces, which enabled them to fully comprehend the evidence, ideas, and arguments that governments needed to inform decision-making. Some projects required support to articulate policy influence pathways and processes, and more could have been done to facilitate peer learning with partners who had strong expertise in policy and media engagement.

### Recommendations for future responses

- Balance positioning partners to deliver rapid evidence generation that informs the response in real time, with identifying signs that will enable funders to ‘spot the big emerging issues.’

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- Engage policy audiences in the research design phase to understand their priorities, perspectives, incentives, and pressures, and consider how research processes can generate relevant, useful, and accessible evidence.
  - Accept that familiar pathways to policy influence may be disrupted by the crisis. Create spaces to encourage peer learning on mechanisms to respond to a rapidly evolving context, meeting the need for immediate evidence and innovation and delivering new modalities and virtual forms of engagement.

## 2. Timing was a critical factor in the flexibility to mobilise funds quickly to deliver a rapid response.

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Timing was a key chance-enabling factor in the design and delivery of the CORE mechanism. Crucial decisions on the design of CORE aligned with both the final stages of development of the new IDRC strategy and the new financial year, allowing significant thematic and funding flexibility.

IDRC explored potential strategic partnerships with other governmental and multilateral agencies, but the administrative steps required would have slowed its response considerably. IDRC prioritised the speed of the response and created CORE with C\$25m from its own central budget.

### Recommendations for future responses

- Explore options to develop flexible funding arrangements that could support future crisis response at short notice that does not align with annual budget and strategy development cycles.

## 3. The decision to make a closed call represented a trade-off between speed of response and risk management.

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The design of CORE needed to balance the speed and scale of response with risk mitigation and flexibility. This was done by working with established partners who had proven systems to manage funds, and strong research and policy engagement capacities. This approach provided a degree of security that enabled flexibility around proposal development, budgeting, reporting, and other systems. In some cases, CORE took risks on existing grantees, providing significant additional funding that allowed them to scale up their work and adapt it to the new context. Robust contextual knowledge and relationships of trust built between POs and grantees were key enabling factors in offering grantees the flexibility to respond to their evolving contexts.

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*“Closed or open call was the hardest choice we made. Making it open would have [slowed down the process]. It was the right thing to do. We took a higher operational risk in flexible funding and getting the money out of the door quickly.”*

PO, IDRC

However, this decision implied trade-offs in terms of the missed opportunity to bring in new partners that may have been better positioned in terms of the changing policy context, or their ability to innovate and respond to emerging issues on the ground. The closed call also reduced the visibility of CORE as a funding mechanism and limited opportunities for grantee organisations to form strategic partnerships across the cohort to coordinate on project design. In future responses, a hybrid model could be considered to combine the security and design flexibility of a closed call with aspects of open calls that encourage a diversity of grantees and have the potential to promote innovation.

### **Recommendations for future responses**

- Offset the closed nature of a call by gathering information from country POs and RDs, and through existing institutional relationships to identify a broad group of potential organisations to invite to apply for funding.
- Consider conducting rapid political economy analysis and regional or country stakeholder mapping to support the identification of potential partners from outside existing networks.
- Explore hybrid models such as responsive windows that would facilitate different funding modalities and levels of risk within a single programme.

## **4. A broad thematic focus enabled a flexible rapid response, although there were trade-offs around operationalising the research.**

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The broad thematic focus of CORE captured a range of relevant initiatives, with differences of opinion around whether a more specific, defined thematic focus would have been preferable versus a broader mandate to include themes such as sustainability, green recovery, social protection, and food security. The breadth of the research themes was seen as an enabling factor in delivering a rapid response with strong in-built flexibility supporting adaptation and response to the rapidly evolving context.

Providing more guidance or framing for the themes, alongside clearer definitions, could have sharpened the focus of research and helped grantees to interpret and operationalise work in each of the thematic focus areas. Stronger engagement with partners in defining the thematic areas could have led to greater innovation, yet such a consultative approach would have reduced the speed of response.

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## Recommendations for future responses

- Provide framing and guidance on thematic areas to support partners to develop proposals and to guide implementation. Work with regional offices to contextualise definitions and interpretations of these themes.
- Create an advisory mechanism for Southern partners to provide input into programme design and defining thematic focus areas.

## 5. CORE built on previous investments with Southern think tanks and strengthened capacity and relationships across a cohort of Southern partners.

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*"IDRC built its reputation to support quality research from think tanks in a time of crisis and have a ready aggregator which could become the go to partner that is able to provide rapid and credible evidence in response to shocks."*

Reflection meeting participant

CORE is unique in its approach to working with Southern think tanks and research organisations to build an evidence base on the socioeconomic impacts of the pandemic on marginalised populations. This built upon previous IDRC investments in these Southern partner organisations. An alternative, and perhaps more standard approach, would have been to provide large institutional grants to one or two universities in the South. CORE further strengthened a cohort of Southern partners by building a network of grantees working at local, national, and global levels. This network provides a social science perspective on the effects of the crisis as both a response to the Covid-19 pandemic and an investment in responses to future shocks.

The design of CORE was sufficiently flexible to provide grants to different types of project partnerships and consortia. These investments contributed to building capacity and provided support for smaller, more nascent organisations. Opportunities were created for existing partners to establish and strengthen regional consortia within the cohort. The focus on building a global research network and investment in a KT support function placed emphasis on strengthening connections across the cohort and facilitated new avenues for South-South knowledge sharing and collaboration.

Knowledge sharing and collaboration take time and need to be adequately resourced in programme budgets. More could have been done to facilitate the leadership and advisory role of Southern partners to outline the CORE research agenda; opportunities to identify potential synergies and partnerships were missed in the early months of CORE. Cohort partners bring different skills and experience in areas such as gender, policy engagement, and connecting to civil society – creating exciting opportunities for peer learning and collaboration. Grantees who are willing to take on leadership roles to facilitate peer learning and knowledge exchange need sufficient budget to ensure this time investment is viable and sustainable.

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## Recommendations for future responses

- Maintain emphasis on delivering grants to a wide range of think tanks, research organisations, and consortia that build a foundation of networked Southern partners and increase capacity to react and respond to future shocks and rapid responses.
- Invest in building relationships across research cohorts and ensure that peer learning and support is resourced in project budgets to leave a legacy of connections and knowledge that can be mobilised in future rapid responses.
- Ensure transparency in the research design phase to enable partners to shape the research focus and establish synergies and collaborations around specific research and methodological focus areas.

## 6. Knowledge exchange and coordination of policy engagement should bring together institutional departments and divisions as well as regional offices.

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*“Collaboration and coordination across divisions takes time and tools, but there’s often not enough of these to do this.”*

PO, IDRC

CORE created opportunities to work across IDRC divisions and break down the inevitable silos that exist in all large development agencies. However, CORE projects remained a relatively small part of individual POs’ overall portfolios, limiting their ability to invest time in cross-division communication, networking, and knowledge sharing. This potentially resulted in missed opportunities to identify synergies and coordinate policy engagement across the cohort. CORE did, however, create opportunities for regional coordination and highlighted a role for regional offices to broker relationships across different programmatic Covid-19 responses to facilitate greater access to regional policy spaces.

## Recommendations for future responses

- Establish spaces for internal consideration of emerging policy messages and coordination of policy engagement to stimulate cross-divisional, cross-departmental, and cross-regional conversations.
- Engage regional offices to explore opportunities for coordination across regional programmes and map regional policy spaces to consider how different projects could collaborate to share evidence in those spaces.
- Facilitate coordination between regional offices to explore synergies and mechanisms to connect regional evidence with global policy spaces.

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## 7. There was a trade-off between the global scope of CORE and its mechanisms for stronger regional coordination and contextualisation.

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There are tensions and trade-offs between the global and regional dimensions of CORE. On the one hand, strong emphasis on regional coordination is seen to support stronger peer exchange and contextualisation of evidence around priority thematic areas, in turn amplifying Southern voices by coordinating policy messages, communications plans, lobbying, and influencing activities. On the other hand, working across regions connects partners to global policy opportunities towards CORE's goal of enhancing Southern voice and leadership in global policy spaces. Future responsive mechanisms need to clarify assumptions and models to support and build upon regional synergies whilst facilitating access to global policy conversations and engaging in national policy spaces.

*"The regional vs global should be looked at on a case-by-case basis – not everything needs to be or should be global."*

Grantee

CORE also includes several examples of multi-region projects which highlight the need to take an iterative and case-by-case approach. It is seen as important to consider the most appropriate activities and engagement strategies at and across different levels, being cognisant of partners' different foci, themes, methods, and networks.

CORE grantees valued IDRC and IDS' global connections and communications channels, and opportunities to access and position themselves in global policy spaces. Grantee organisations reflected that IDRC funding provides a 'soft' legitimacy that gives them credibility in national policy spaces. However, there is room to do more to connect grantees and develop coherent messages and coordinated policy engagement approaches across regional and global levels.

### Recommendations for future responses

- Consider regional variances in programme design, such as priority themes, policy priorities, existing networks, partner capacity, and engagement methods, and how these can be used to identify cross-cutting themes, regional project groupings, and opportunities for influencing policy.
- Support horizon scanning for upcoming events or policy windows and conduct stakeholder mappings to identify potential policy audiences. These activities can support the coordination of research engagement activities across global, regional or national levels, and the tailoring of messages, outputs and communications activities to specific audiences.



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- Use funding agencies' networks and positions to support grantees to access closed and invited spaces within global policy circles.

## 8. CORE's gender focus evolved as the scale of the impact of the pandemic on women became apparent, but not all partners have skills to mainstream gender.

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*"We didn't perceive the scale of the gendered impacts of Covid-19 – we would put much stronger emphasis on gender if we were to repeat this."*

Senior manager, IDRC

Gender was a key consideration and cross-cutting theme in the design of CORE, but IDRC did not anticipate the full scale of the impact of the pandemic on women. The intention was that all projects should incorporate a gender lens, but this did not fully consider the different levels of capacity to work on gender amongst partners and regions. Support and guidance to help mainstream and prioritise gender and adapt research methodologies to enable a gendered analysis was valuable, but stronger ongoing support was needed by less-experienced partners to really define and position the gender element of their work.

More could have been done to proactively engage with policy questions around gender issues by connecting to relevant government ministries and women's rights, advocacy, and support organisations, to identify emerging priorities and issues early in the research design process. Incorporating gender into the macroeconomic research theme was particularly challenging and based upon assumptions of the availability of gender-disaggregated data which did not exist in many national contexts.

The range of grantee capacity to integrate gender dimensions into their research created strong opportunities for peer learning around both gender mainstreaming and the differing regional perspectives on gender. Knowledge exchange on gender mainstreaming has the potential to support leadership and mentoring roles for some Southern partners, specifically around the development of nuanced questions that address language barriers between regions, and reflect regional realities.

### Recommendations for future responses

- Provide more guidance and framing of gender as a cross-cutting theme and outline gender-responsive approaches to support partners in project design. Communicate expectations to support projects to work at the right level of their capacity and clearly set out the potential steps to make research more gender responsive.

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- Explore the potential for multi-disciplinary approaches to support research to increase understanding of the disproportionate impact of crises on vulnerable groups including women and girls.
  - Map stakeholders with a specific interest in gender issues and outcomes working at different levels (global, regional, and national) and develop engagement strategies to share evidence from CORE.
  - Assess gender capacity across the cohort and identify gender champions to showcase ideas and approaches. Provide mentors for partners who face capacity or methodological challenges in producing gender-responsive research. Create opportunities for cross-regional learning that highlights the socio-cultural differences across regions.

## 9. In a rapidly evolving context, grantees value opportunities for peer learning to support adaptation and responsiveness.

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Grantees valued CORE's emphasis on peer learning and knowledge exchange to inform adaptations to methodologies and engagement innovations. Grantees recommended more in-depth 'clinic' style learning forums supporting smaller groups to explore in detail methodological challenges faced related to their specific thematic area of focus. This approach also has the potential to strengthen collaboration amongst grantees as well as within consortia. Larger spaces for peer learning tended to produce less meaningful interactions between projects or shallow engagement on broad topics that proved unhelpful in addressing specific thematic or methodological questions.

CORE invested in a KT function to facilitate peer exchange and coordinate policy engagement across multiple grants with a view to establishing mutual learning spaces that support and promote Southern leadership and voice. Mutual learning activities require active participation and, by extension, a time, energy, and often a financial commitment from grantees, particularly in processes where it is desirable for grantees to take on a leadership role. The objectives of such activities and events need to be clearly articulated and focused on participants' needs, whether this relates to skills development and capacity building, work to increase profile and extend networks, or to convene policy conversations.

### Recommendations for future responses

- Facilitate spaces to bring projects together and support working groups to cluster projects around shared thematic interests, challenges, or geographic foci.
- Ensure mutual learning activities have a clear and specific objective and focus.

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## Concluding Remarks

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The CORE Learning Journey produced rich and detailed information and identified numerous challenges that were overcome through delivery of a rapid response mechanism. Reflections from Learning Journey participants were highly constructive and focused on exploring how the CORE cohort and IDRC could increase the effectiveness of the programme. The Learning Journey highlighted trade-offs and decisions made by IDRC, and therefore generated lessons with broader relevance beyond CORE and the Covid-19 pandemic. We hope these lessons will be useful for other development agencies as they reflect upon their own responses to Covid-19, and the learning that can be carried forward to prepare for future crises.

### Suggested citation

Clark, L.; Carpenter, J. and Taylor, J. (2022) *Learning From Responsiveness to a Rapidly Evolving Context: IDRC's Covid-19 Responses for Equity Programme*, CORE Learning Report. Brighton: Institute of Development Studies, DOI: [10.19088/CORE.2022.004](https://doi.org/10.19088/CORE.2022.004)

### About this report

This Learning Report was produced as part of the Covid-19 Responses for Equity (CORE) Knowledge Translation Programme, which supports the translation of knowledge emerging from the CORE initiative. Supported by the International Development Research Centre, CORE brings together 21 projects to understand the socioeconomic impacts of the pandemic, improve existing responses, and generate better policy options for recovery.

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DOI: [10.19088/CORE.2022.004](https://doi.org/10.19088/CORE.2022.004)