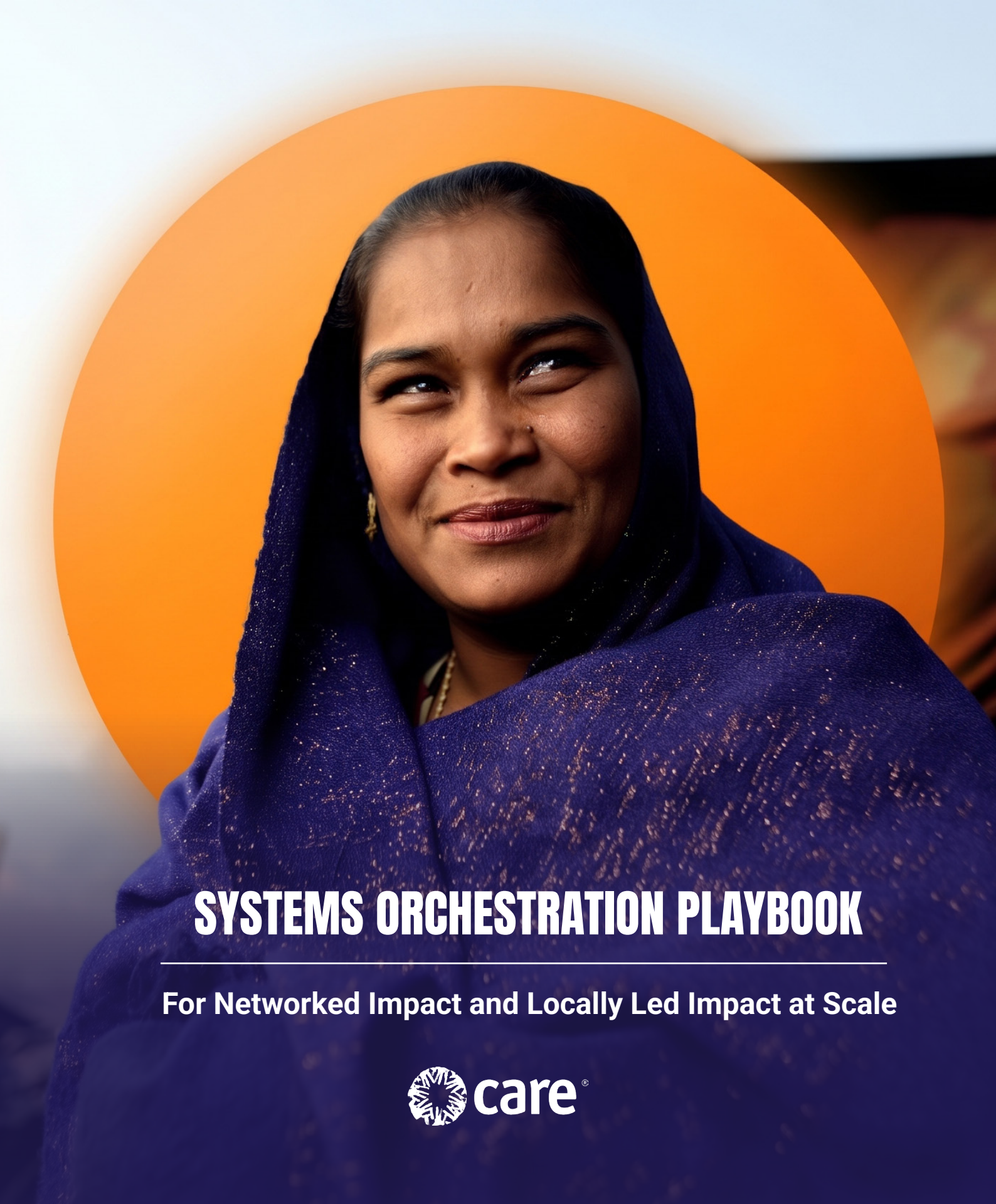


SYSTEMS ORCHESTRATION PLAYBOOK

For Networked Impact and Locally Led Impact at Scale

care®

SYSTEMS ORCHESTRATION PLAYBOOK

For Networked Impact and Locally Led Impact at Scale

Developed in Partnership with:

GENEVA GLOBAL
A GLOBAL IMPACT VENTURE

Contents

Introduction

Glossary
8 Aim of the Playbook
11 About the Systems Orchestration Playbook
12 How to Use This Playbook
13 Why Is Systems Orchestration Essential to Durable, Locally Led Impact at Scale?
15 Systems Orchestration Process

16 Stage 1: Preparation

19 Step 1: Understand Systems Orchestration
21 Defining Systems Orchestration
22 When Does Systems Orchestration Make Sense?
23 Who Is the Systems Orchestrator?

26 Step 2: Stakeholder Mapping
28 Stakeholder Mapping Activity: What to Expect
29 Technical Domains in Systems Orchestration
30 Stakeholder Mapping

35 Step 3: Assessing System Readiness
36 Assessing System Readiness Activity: What to Expect
37 Enabling Environment
38 Suitability
39 The 7 Operational Dimensions of Systems Orchestration

42 Step 4: Phase Planning Mindset
44 Phase Planning Mindset Activity: What to Expect
45 Planning Ahead: Phases and Timeline
46 Sequencing: Conceptual Framework
48 Case Study: Scaling VSLAs to Expand Access to Savings and Credit in Rwanda

Contents

52 Stage 2: Design

55 Step 5: Define Program Purpose & Core Outcomes
57 Define Program Purpose and Core Outcomes Activity: What to Expect
58 From Outcomes to Ownership: Orchestrating Host System Institutions for Scalable, Durable Impact
59 Case Study: VSLA System Integration Objectives and Indicators for CARE Rwanda

65 Step 6: Co-Creating Systems Orchestration Strategies
66 Co-Creating Systems Orchestration Strategies Activity: What to Expect
67 Key Considerations
68 Case Study: Farmer Field and Business School Strategies, Nepal

72 Step 7: Identify Stakeholder Roles & Functions
73 Identify Stakeholder Roles and Functions Activity: What to Expect
74 Key Considerations
77 Case Study: VSLA Rwanda Elements and Actors

82 Stage 3: Implementation

86 Step 8: Create Your Systems Orchestration Plan
87 Create Your Systems Orchestration Plan What to Expect
88 Key Considerations
89 Developing the Systems Orchestration Plan
95 Case Study: Systems Orchestration Plan for FFBS in Nepal
97 Case Study: Strategic Objectives for VSLA Systems Orchestration in Rwanda

103 Step 9: Implement the Systems Orchestration Plan
104 Implement the Systems Orchestration Plan Activity: What to Expect
105 Key Considerations
106 CARE Country Office Systems Orchestration Support Functions
107 Preparing to Support the Systems Orchestration Process

110 Conclusion

Contents

Appendix

115 Reflection Questions 2.1: Technical Domains
116 Worksheet 2.2: Identifying Current Partners
119 Reflection Questions 2.2: Identifying Current Partners
120 Worksheet 2.3: Mapping Strategic Functions to Organizational, Institutional, and Administrative Levels
122 Worksheet 2.4: Identifying Stakeholder Core Team

123 Assessing System Readiness Activity
124 Worksheet 3.1: Current Practices
126 Worksheet 3.2: Current Challenges
128 Worksheet 3.3: Key Assets and Advantages

130 Phase Planning Mindset Activity
131 Worksheet 4.1: Articulating a Vision of the Intervention's System-Led Implementation at Scale
136 Worksheet 4.2: Core team-Systems Orchestration Roles and Responsibilities
138 Worksheet 4.3: Identifying Host System Institutions That Will Be Integral to an Intervention's System Integration and Sustained Scaling

142 Define Program Purpose and Core Outcomes Activity
143 Consultation Session 5.1: With Front-Line Stakeholders
144 Workshop Session 5.2: System-integration Scoping
145 Worksheet 5.3: Elaborating a Program's Core Outcomes and Indicators

147 Co-Creating Systems Orchestration Strategies Activity
148 Consultation Sessions 6.1: Front–Line Stakeholders
149 Workshop Session 6.2: System-integration Scoping
150 Worksheet 6.3: Defining Key Strategies to Achieve Systems Orchestration Objectives

152 Identify Stakeholder Roles and Functions Activity
153 Workshop Session 7.1: Key Stakeholders Roles and Responsibilities
154 Worksheet 7.2: Identifying Stakeholder Roles and Responsibilities
156 Worksheet 7.3: Orchestration Functions and Their Responsible Sectors

161 Step 8: Create Your Systems Orchestration Plan Activity
162 Workshop Session 8.1: Principal Strategies for a Comprehensive Systems Orchestration Plan
164 Worksheet 8.2: Experience and Expertise Required for Systems Orchestration – Host System Staff Capacity
166 Worksheet 8.3: Experience and Expertise Required for Systems Orchestration – CARE Staff Capacity

168 Step 9: Implement the Systems Orchestration Plan Activity
169 Worksheet 9.1: CARE Support Plan for the Systems Orchestration Strategy
170 Workshop Session 9.2: Staff Audit and Operational Planning
172 Acknowledgments



Glossary

Term	Definition
Capability	The resources, procedures, and circumstances required to turn capacity into real action and outcomes.
Capacity	The technical knowledge and skills to do something.
Catalytic impact	Impact that scales exponentially when host-system actors sustainably scale solutions through local systems, utilizing their own resources, without direct intervention by CARE.
Competitive landscape assessment	Scan the field for similar solutions to understand which one is more impactful, simple, affordable, cost-effective, or scalable for the host system. se this assessment to prioritize the proven solution with the greatest impact, which the system will be best able to own and sustain in the long run instead of preserving any one organization's model.
Comprehensive theory of change review	Pressure test your existing theory of change with scale in mind. Explore how the proven intervention achieves outcomes, challenge key assumptions, and determine which elements must be preserved, adapted, or dropped to remain effective at scale.
Core model	The fundamental parts of an intervention—elements essential to achieving impact. This differs from the full model, which may include optional or flexible components that can be trimmed with minimal impact.
Direct delivery	A traditional grant-funded approach, where CARE designs and implements a program in a specific location over a defined project cycle, impacting a limited number of people with no clear path to maintain or expand reach beyond the organization's footprint project cycle.
Doer	The actor or actors who will implement the solution.
Doers at scale	Stakeholders and institutions responsible for maintaining and scaling the implementation after CARE's (and other external partners') direct role ends. They may include government, civil society, and private-sector actors at central, regional, and local levels.
Enabling environment	The combination of political, economic, social, cultural, and environmental conditions that support an intervention's success, shaped by local actors and institutions.
Enabling environment review	Analyze the system in which scaling will occur, its policies, stakeholders, incentives, and barriers, to understand whether and how systemic realities will impact scaling efforts, and to inform your Systems Orchestration strategy.
Evidence review	Evaluate whether the proven intervention is supported by substantial evidence of impact and if that impact is likely to hold at scale. Disaggregate data, assess external research, and identify gaps that must be addressed to build confidence in scale readiness.
Host system or host country system	The overarching governmental and non-governmental structures and institutions—at local, regional, and national levels—that comprise the system through which scaling will happen.
"Hothouse flower"	Interventions that are designed with intensive attention and resources typical of grant-funded pilot settings but not available to local systems that must maintain and scale them post-funding.
Impact at scale	Sustainable scale that leads to exponential impact, reaching the majority of a target population, beyond the limited reach of direct implementation. Achieving this requires host country systems to act as "doers at scale" and "payers at scale."

Term	Definition
Intervention	Any project, program, approach, solution, or initiative designed to drive meaningful, measurable impact. Systems Orchestration is planned and executed around a specific intervention.
Local system stakeholders or actors	Institutions and individuals embedded within and comprising the local system. Distinguishing between stakeholder actors that are institutions vs. individuals is crucial because though institutions change infrequently, actors within them can change frequently, and influencing each requires different strategies.
Optimal fidelity model	A streamlined version of an intervention that preserves core components essential for impact while simplifying the solution and reducing costs to enhance scalability by local actors.
Payer	The actor or actors who will fund delivery of the solution.
Payers at scale	Institutional entities that will fund an intervention as system integration and scaling occur. There can be multiple payers (government, civil society, private sector, international) at all administrative levels.
Replication	When CARE and its partners implement an intervention that has been successful in one context, adapting it for new settings and directly delivering it using grant funding, thereby increasing its impact linearly, through the organization's own footprint.
Scaled theory of change design	Design a revised theory of change that reflects how the intervention would function at scale, anticipating trade-offs and forecasting likely outcomes based on a leaner or adapted model.
Scaling pathways	Scaling pathways are defined by who will have ownership and/or responsibility for the solution over time (the "doer") and who will take financial responsibility for covering program costs (the "payer"), enabling system integration and sustainable scale.
Sustainable scale	Sustainable scale is achieved when other actors—particularly governments, the private sector, and civil society organizations—adopt, implement, and pay for a proven solution, impacting a majority of the target population facing the problem. Achieving sustainable scale requires deliberate steps to equip local systems as both "payers" and "doers" at scale.
System integration	Achieved when the intervention is fully embedded in the host country system, and when that system has committed to (1) allocating the resources, planning effort, and political capital for effective, continued delivery of the intervention; and (2) training, supervision, and ongoing support to sustain, refresh, and evolve the intervention over time.
Systems Orchestration	A strategic process that transfers the "doing" and "paying" of an intervention from external actors (e.g., CARE) to permanent local institutions—government, civil society, and the private sector. This multi-year process builds local ownership and capacity.
Systems Orchestrator	As a Systems Orchestrator, CARE delivers networked impact by strengthening the conditions and relationships that enable sustained delivery and financing of proven models—playing a supportive role in identifying, aligning, and strengthening the people, institutions, and conditions necessary for local stakeholders to adopt, fund, and deliver solutions at scale.
Systems-level impact	The result of efforts to change entrenched systems so they work better for people—by strengthening institutions, shifting social norms, influencing policy, and supporting social movements—advancing structural changes that improve lives beyond CARE project participants.

About the Systems Orchestration Playbook

Aim of the Playbook

Welcome to CARE's Systems Orchestration Playbook! This comprehensive guide has been created to assist staff across the CARE Confederation to develop and carry out strategies that build local ownership of proven solutions from the very start, with government, private sector, and civil society organizations that together make up the host country system taking on the roles of doer and payer as early and as fully as possible.

Think of this Playbook as a guide for CARE to support host system institutions and actors as they integrate these proven interventions into existing systems and set them on a trajectory to reach broad and sustained impact at scale through institutionalization. While this guidance draws widely on related research and practice from around the world, you will find it also draws heavily on the experience of Systems Orchestration planning and system integration work done by two CARE country offices: Nepal and Rwanda. Specifically, these efforts focused on the development of Systems Orchestration plans for CARE's Farmer Field and Business Schools (FFBS) intervention in Nepal and the Village Savings and Loan Associations (VSLA) program in Rwanda.

As you utilize this Playbook, our aim is to not just inform, but also to inspire. By the time you finish reading, we hope you'll have gained a deeper understanding of Systems Orchestration as both a goal and a process, an appreciation for the essential role it plays in achieving durable, locally owned impact at scale, and how it connects to outcomes CARE and local systems are working toward together. You will explore the important potential outcomes and objectives that come hand-in-hand with adopting Systems Orchestration as an operational approach. Perhaps most importantly, you will gain practical guidance and a set of concrete tools for approaching this vital work.

Our goal is simple: help CARE staff understand the 'why' and 'how' of Systems Orchestration by exploring key considerations and breaking down the steps involved in the Systems Orchestration 'journey'. So, whether you're starting from scratch or looking to fine-tune existing strategies, it's our hope that you'll find valuable insights in this Playbook.

What the Playbook Covers

The Systems Orchestration Playbook contains insights and reflections rooted in hands-on experience in CARE Country Offices. In this Playbook, you will find:



An Introduction to Systems Orchestration:
We begin by demystifying Systems Orchestration as a concept, helping you understand not just what it is but also why it matters to achieving lasting, locally owned impact at scale.



Practical Aspects of Systems Orchestration:
We investigate the essential considerations to address when beginning your Systems Orchestration journey.



Step-by-Step Guide:
Here we break down the Systems Orchestration approach through step-by-step guidance. Each step includes decision-making considerations and practical strategies to set you and host system institutions on a path to successful system integration and impact at scale.



Interactive Materials:
To help link Systems Orchestration to your unique context, we've prepared worksheets, activities, and/or key questions to accompany each step. These aim to spark creativity, prompt thoughtful reflections, and facilitate discussions with colleagues, team members, partners, and networked system stakeholders to help mobilize all concerned actors around a shared vision and set of actions to move towards an intervention's eventual system integration.



Examples from CARE Programs:
We've interspersed illustrations of certain steps drawn from the Systems Orchestration plans developed for FFBS by CARE Nepal and for VSLA programs run by CARE Rwanda.

The guidance, steps, and tools in this Playbook are designed to not only stimulate dialogue, but also to guide planning efforts with the networked local systems actors who will integrate proven, scalable interventions into local systems, so those systems can deliver impact at scale.

How to Use This Playbook

This Playbook serves as a facilitation tool, not merely a reference guide. It's designed to help your team understand and apply the Systems Orchestration process through structured steps, co-creation activities, and reflection. Use it to navigate the complexity of integrating and scaling interventions within host systems, while staying grounded in adaptive, locally owned strategies.

Each step of the Playbook builds on the previous one, helping you transition from problem framing to shared ownership, system alignment, and sustainable scale. Whether you're launching a new initiative or deepening one already underway, this Playbook is designed to guide collaborative planning, partner engagement, and system-level decision-making.

What You'll Find Inside

Step Overviews: Set the purpose and core objectives of each phase in the Systems Orchestration process.
Activity Pages: Explain how to use relevant tools—like worksheets, workshop prompts, and reflection questions.
Core Content: Provides plain-language explanations of key concepts for each step. Always read this content first—it helps ground your team in the mindset, terminology, and approach before diving into the activities.
Worksheets and Reflection Questions: Support structured thinking, team planning, and surfacing of critical insights. Use them to align perspectives, clarify strategy, and support joint decision-making.
Appendix: Houses all supporting materials, including editable worksheets, sample templates, and reflection tools. These are organized by step and labeled clearly (e.g., Part 1, Part 2) when multi-page tools are included.

Additional Resources for CARE staff

CARE staff can access the internal Rapid Tools for Systems Orchestration Stakeholder Mapping workbook for more detailed, step-by-step support with stakeholder mapping. This resource complements Step 2 of the Playbook and directs teams back to the Playbook for subsequent steps.

Keep This in Mind

Systems Orchestration is not about checking boxes. It's about helping interventions embed and thrive within real systems—with real constraints, actors, and opportunities. Use this Playbook to navigate that complexity, build shared ownership, and design for long-term resilience.

Why Is Systems Orchestration Essential to Durable, Locally Led Impact at Scale?



In Vision 2030, CARE committed to moving beyond direct implementation and toward a locally led future. This focus was rooted in the understanding that CARE cannot deliver solutions that match the scale of the problems our target populations face by working through our own footprint with grant funding alone. Sustainably scaling interventions for exponential impact is only possible when we work through other "doers and payers at scale" – the local systems actors like government, private sector, and civil society that comprise a host country system. Indeed, the only way to achieve durable impact at scale is for host country systems to fully own, deliver, fund, and institutionalize an intervention.

Systems Orchestration is a process for transferring the roles of the "doer" and "payer" of an intervention to stakeholders in the host system. CARE's role in this process is to be the initial Systems Orchestrator that supports those stakeholders through this transition, ensuring they have the capacity, capability, confidence, commitment, and resources needed to take on the "doer" and "payer" roles.

Over time, however, the Systems Orchestration role must transfer to a lead institution within the host system — most likely a government body, that has the legitimacy, incentive, and capability to sustain the intervention. Similarly, CARE may provide some financial and technical support to the host system early in the Systems Orchestration process. Ultimately however, full responsibility for planning, funding, implementing, monitoring, evaluating, and evolving the intervention must transfer to host system stakeholders and be led, or "orchestrated," by one system stakeholder with the necessary authority and influence.

There are three primary reasons for this transfer of responsibility:

1

It makes impact more durable

We always expect an intervention's impact to be sustained after funding ends, but the best way to make sure of that is to integrate the intervention into a host system's institutional structures, mandates, and operations, enabling host system actors to take on full responsibility for implementing, financing, continuing, and evolving the model over time. Host system actors need several things to make that happen, including capacity, commitment, and resources.

2

It expands the scale of impact

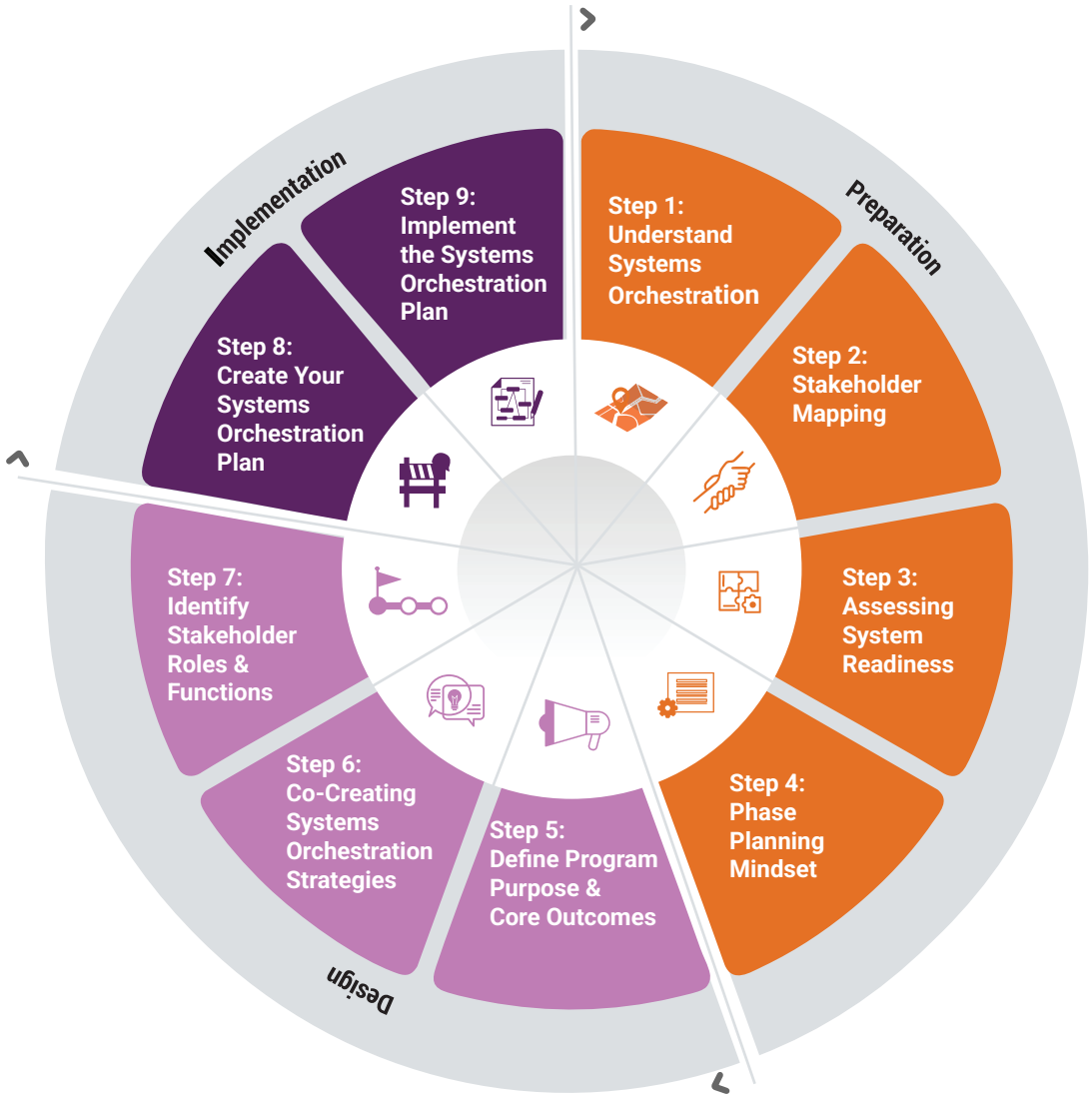
Even in the best-case scenario the limited scope, timeline, and reach of a grant-funded intervention will limit its efficacy in solving a critical challenge for the majority of the population facing the targeted problem. Scaling an intervention to the larger population could solve for that, but entities like CARE don't have the resources, authority or mandate to make that happen. Only local system actors and networks truly do have what's needed.

3

It promotes the solution's adaptation and improvement over time

Context can make or break a solution at scale, and adaptively managing solutions to suit evolving realities is essential to success at scale. When networks of local system actors are prepared and willing to integrate the solution into existing structures and strategies, they can engage together in the collaboration, coordination, and precise planning required to ensure the sustained success and impact of a solution at scale.

Systems Orchestration Process



Stage 1 : Preparation

The Preparation Stage sets the stage for successful Systems Orchestration by ensuring that the foundational elements are in place. This includes understanding the system, assessing its readiness, and identifying the right stakeholders. By the end of this stage, the CARE team will have a clear road map for engaging local stakeholders and aligning the system for scaling.

This stage will help you answer

Stakeholder Buy-In: Early engagement with stakeholders to identify a core group of allies and gather support for the pilot and refinement process across the broader stakeholder ecosystem.

System Readiness: Evidence showing that the intervention works and is adaptable to the host system's context.


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Step 1:

Understand Systems Orchestration



Step 1: Understand Systems Orchestration

Systems Orchestration is about more than just implementing new strategies for program delivery, it represents a whole new way of thinking about implementation, ownership and impact. It centers on actions that equip and motivate local systems to own implementation and scaling impact over time. Transitioning to this new way of doing things comes with challenges—as ownership of solutions transfers to networked local actors, CARE must relinquish direct control over implementation and outcomes, and host system stakeholders must step into roles that CARE previously held and financed. Sustained commitment of effort and resources from the local system, and eventual system integration, are essential.

Overview

01 Start by understanding and articulating what Systems Orchestration is. Focus on transferring ownership of an intervention from CARE to local systems (government, local organizations, etc.). Ensuring the intervention's durability in the local context in the local context requires an intervention's implementation, evolution and scaling to be fully embedded within the host system. This system integration is the ultimate goal of the Systems Orchestration process.

02 Clarify CARE's overarching role as a Systems Orchestrator. CARE supports networked impact and institutionalization by strengthening local implementers and funders, adapting evidence-based interventions to fit their context, balancing quality with flexibility, and fostering supportive policies and resources so local actors can fully own and sustain scalable programs.

03 Identify the conditions under which a CARE Country Office should begin orchestrating with local stakeholders. A Country Office is ready to launch a Systems Orchestration effort when it has credible evidence of impact, alignment with host-system priorities, strong stakeholder relationships, and a broad network of trusted partners—ideally leveraging government legitimacy to convene others.

04 Understand CARE's initial "orchestrator" functions and host actors must understand why they should adopt and fund the intervention, clarify what they need to manage operationally and technically, identify who will make decisions and take action, and decide when to initiate each of the three Systems Orchestration stages.

Defining Systems Orchestration

In its role as Systems Orchestrator, CARE's job becomes to strengthen local networks of doers and payers at scale and then support them with capacity-building, technical advisory services and relevant expertise until they can fully adopt, implement and pay for the intervention and own its growth and evolution. Specifically, CARE's four related objectives are to:

1. Transition to "locally led" ownership of scalable interventions by supporting, strengthening and leveraging the capacity, capabilities, and resources of local systems actors;
2. Adapt or design evidence-based interventions to fit the capacity, capabilities, and resources of the host system, making them simple, affordable and cost-effective enough for local systems actors to adopt, implement and pay for them;
3. Ensure interventions are scaled with an appropriate combination of fidelity and flexibility by the local systems actors that adopt and implement them, maintaining a desired depth of impact while extending breadth of impact through scale and durability; and
4. Foster an enabling environment that will support and sustain the intervention being scaled.

When Does Systems Orchestration Make Sense?

A Country Office might be ready to engage with stakeholders in a Systems Orchestration process if it has:

- ample and credible evidence that the intervention to be scaled is highly effective and efficient in achieving impact, and that it is well-suited to the target context and the outcomes prioritized by the host system;
- confirmation that the intervention can be adapted to fit government capacities, capabilities, and resources, and that it is simple, affordable, and cost-effective enough for local doers and payers to realistically adopt, implement, and finance at scale;
- strong relationships with government officials, private sector partners, and peer organizations for networked impact; and
- a wide network of trusted local, national, and external partners in the target context.

It is important to note that the host system government may be best placed to aid the CARE Country Office in earning the commitment of other local stakeholders, since most stakeholders will likely view government as having greater legitimacy and less bias when coalescing partners around a single intervention.

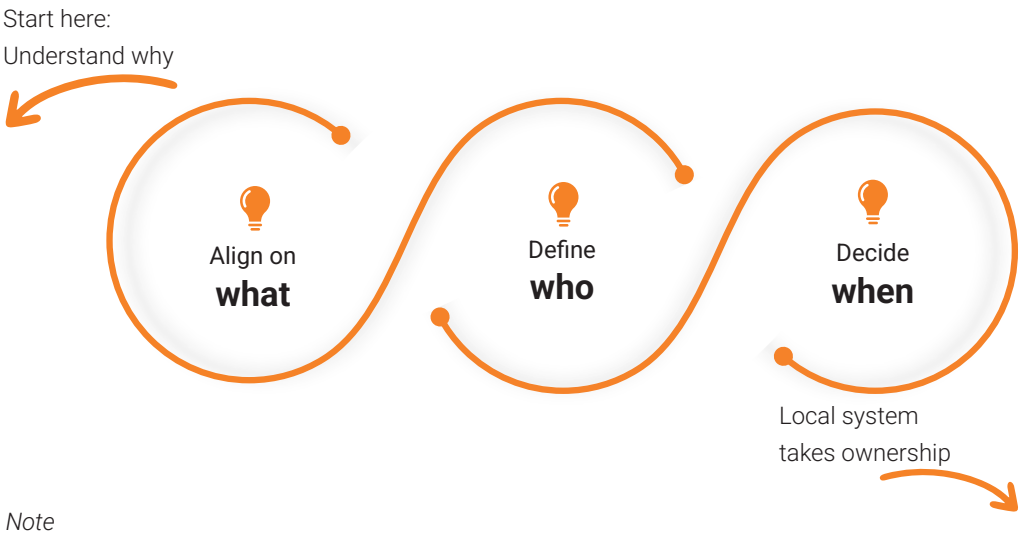
Who Is the Systems Orchestrator?

While CARE Country Offices generally lack the mandate and authority needed to mobilize and direct host system stakeholders, they must initially take on many Systems Orchestrator functions, to provide the early support that will enable host system stakeholders to begin working together on institutionalizing evidence-based interventions for networked impact.

- understand why it is important for host system institutions to take over the responsibility for "doing" and "paying" for the intervention;
- align on what the host system institutions will need to manage as they adapt and adopt the intervention and begin to scale it;
- define who will be the technical and administrative actors responsible for making decisions and taking action; and
- decide when to carry out each of the three major stages of the Systems Orchestration journey.

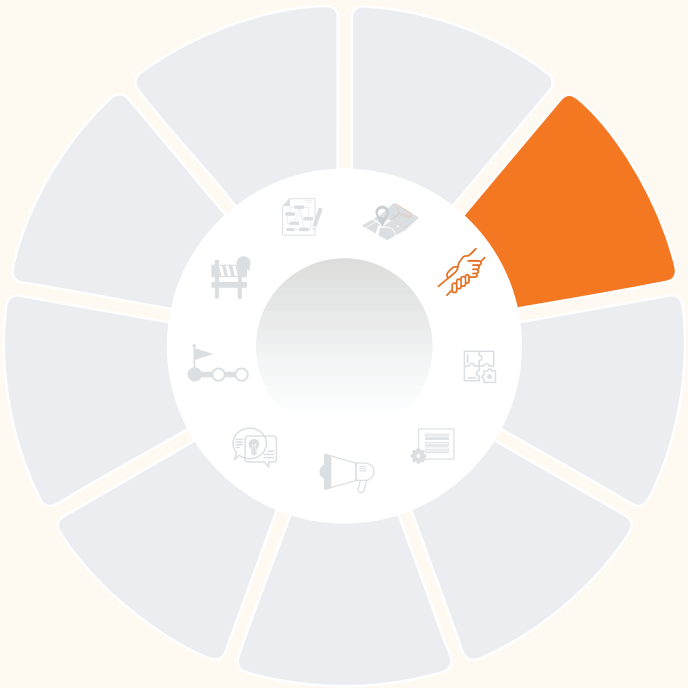
Subsequently, the country office continues to play a crucial role in the process as a stakeholder and catalyst, helping the host country system evolve the intervention over time and grow its reach, to achieve durable impact at scale.

Figure 1: Systems Orchestration Journey



Note
Ownership-building begins at Step 1 ("Understand why"), not at the end of the sequence.







Step 2:
Stakeholder Mapping



Stakeholder Mapping

Systems Orchestration depends on a deep understanding of the people, institutions, and networks that will ultimately lead, fund, implement, and sustain the intervention. Stakeholder Mapping is the foundation for this understanding. It ensures the Systems Orchestration plan is grounded in reality, with clear insight into who holds authority, influence, and responsibility across the system.

This step is about identifying and analyzing stakeholders across sectors (public, private, civil society, other) and levels (central, regional, local). The goal is to map relationships, responsibilities, and power dynamics so that engagement strategies are well-informed and decisions about system integration are made with the right actors, at the right time.

Overview

01 Begin by identifying all relevant stakeholders who are connected to the intervention or problem being addressed. This includes actors across government, private sector, civil society, and other sectors such as donors, media, and academia. Ensure that stakeholders are mapped across central, regional, and local levels.

02 Analyze the roles, responsibilities, influence, and relationships of each stakeholder. Understand who has decision-making power, who controls resources, who provides technical expertise, and who can mobilize support or create barriers.

03 Document any known challenges, gaps, or tensions that may affect collaboration, integration, or scaling. Identify allies, champions, and potential opponents.

04 Use the stakeholder map to inform future phases of Systems Orchestration. The map should guide readiness assessments, engagement strategies, and decisions about when and how to involve specific actors in co-design, capacity building, and system integration for networked impact.

Note: Additional guidance for CARE staff

For step-by-step stakeholder mapping guidance, CARE Country Offices can use the internal Rapid Tools for Systems Orchestration Stakeholder Mapping workbook. Return to this Playbook for subsequent steps.

Stakeholder Mapping Activity: What to Expect

These worksheets are designed to help your team map key local actors that will be critical to the Systems Orchestration process, and eventually to the intervention's system integration and impact at scale. By working through the prompts and tables, you'll gain clarity on who is involved, how they relate to one another, and where responsibilities sit across organizational, institutional, and administrative levels. Use this one-pager as a quick guide to understand each worksheet's purpose, structure, and expected outcomes.

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WHAT YOU'LL NEED
Printed worksheets,

Pens/markers,

Sticky notes

PARTICIPANTS
Project lead,

Technical advisor,

Program manager,

Local stakeholder representative

Note: All worksheets (2.2–2.4) and reflection questions (2.1 and 2.2) are included in Appendix for easy reference.

For CARE staff: Additional stakeholder-mapping guidance is available in the internal Rapid Tools workbook. See Step 2 for details.

1. **Reflection Questions 2.1 : Technical Domains**

   Purpose

   To guide your team through focused reflection on the intervention's technical domains—clarifying scope, assigning ownership, resolving overlaps, distinguishing fidelity versus flexibility, and assessing system readiness—so you build a solid foundation for stakeholder mapping and seamless integration.

2. **Worksheet 2.2: Identifying Current Partners**

   Purpose

   To map out all critical stakeholders in the existing intervention system and understand their roles, relationships, and relative influence—laying the groundwork for a robust engagement strategy.

3. **Reflection Questions 2.2 : Identifying Current Partners**

   Purpose

   After completing the partner tables, pause to reflect on your top allies and engagement strategies. This section helps teams synthesize insights and plan next steps.

4. **Worksheet 2.3: Mapping Strategic Functions to Organizational, Institutional, and Administrative Levels**

   Purpose

   To align each strategic function required for successful Systems Orchestration (e.g., policy development, monitoring and evaluation, budgeting) with the appropriate organizational, institutional, and administrative levels. This ensures clarity around who oversees and executes each function.

5. **Worksheet 2.4: Identifying Stakeholder Core Team**

   Purpose

   To assemble your core group of intervention partners—the 'stakeholder core team' with whom you will work most closely—to lead the initial planning steps. Capturing representatives from government, civil society, private sector, and international actors ensures you have the right mix of mandates, authority, roles, and insights to transition the intervention into a host-system–led program at scale.

Technical Domains in Systems Orchestration

Within a Systems Orchestration (SO) strategy, Technical Domains refer to the specific sectors, thematic areas or disciplines that an intervention must address in order to function effectively—and ultimately scale—within a host system. Put simply, the technical domains encompass all of the "what" of an intervention: the strategies, tools, methods, and content needed to achieve its core objectives. They also determine which stakeholders are responsible or hold authority for those technical elements, ensuring that every aspect of the program's design and operation has a clear "home" within the host system's institutions. This is why detailing the technical domains of a problem or intervention is an essential first step in the stakeholder mapping process.

1. Defining Technical Domains

At their core, the Technical Domains:

- Identify the intervention's main thematic areas (e.g., agriculture, health, access to financial services, education, advancing the rights of women and girls)
- Describe the strategies, technologies, and methods required to deliver the intervention (e.g., curriculum development, training curricula, digital platforms, monitoring tools).
- Specify who must develop, validate, and maintain these technical elements—from ministries or government agencies down to local-level practitioners and partner organizations.

Together, these components answer key questions such as:

- "What skills, processes, and technologies underpin the intervention's success?"
- "Which institutions (and which individuals within them) have the decision-making power over each technical component?"
- "Which stakeholders will lead on quality assurance, ongoing adaptation, and knowledge management?"

By explicitly mapping each technical element to a responsible stakeholder, the SO plan ensures that no critical facet of the intervention is left orphaned—and that downstream system actors can assume both "doing" (implementation) and "paying" (resourcing) roles once CARE's direct support phases out.

2. Why Technical Domains Matter

By clearly linking each operational task (e.g., training, monitoring, service delivery) to a specific institution, a clear understanding of a problem or intervention's technical domains ensures that when system integration occurs, there are no overlaps or gaps in authority and responsibility. It also ensures that core strategies are tailored to local contexts—defining which elements must remain fixed and which can adapt (fidelity vs. flexibility). Finally, by identifying interface points across sectors (e.g., where health education is sensitive to the needs of women and girls), technical domains align diverse actors around a shared implementation framework.

Stakeholder Mapping

The success of Systems Orchestration plan will rely on mobilization of all relevant host system institutions and actors who bear responsibility for operational dimensions like legal, strategy, planning and budget, staffing, technical, training and support, and monitoring and evaluation. Detailing them across three functional categories helps identify clearly the full complement of host system stakeholders who will be essential to the Systems Orchestration effort:

1. **Administrative Levels -** The success of an intervention depends on the coordination of decisions, resources, and actions across various administrative levels within the host system. These levels—central (national), regional, and local—play distinct but interconnected roles in ensuring the effective translation of policy and strategy into concrete

Figure 2: Stakeholder Mapping Administrative Levels



2. **Institutional Sector -** These include government, civil society, the private sector, and international partners. Successful implementation of an intervention requires involvement from diverse stakeholders across different institutional sectors. These sectors bring unique capacities, capabilities, and responsibilities, and when aligned, they create valuable synergies for effective and durable interventions.

Figure 3: Stakeholder Mapping Institutional Sectors



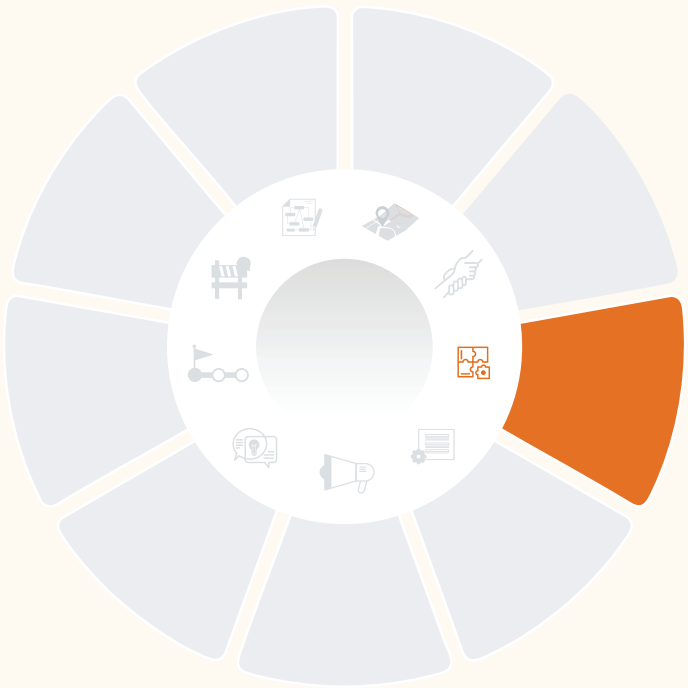
3. **Strategic Functions -** Each administrative level and institutional sector plays a role in crucial strategic functions, ensuring interventions are designed, implemented, and scaled effectively. The graphic below summarizes these functions into three key categories.

Figure 4: Stakeholder Mapping Strategic Functions



Stakeholders across these three categories are the networked actors who will ultimately be essential to the intervention's system integration and impact at scale once the Systems Orchestration process is complete. Understanding their motivations, capacities, and capabilities to fulfill their respective program functions will allow you to include strategies to improve all system actors' performance on all dimensions of the Systems Orchestration







Step 3:

Assessing System Readiness

Step 3: Assessing System Readiness

Balancing flexibility and fidelity ensures that an intervention remains effective and durable in the host context. To develop a strong Systems Orchestration strategy, you must understand the core impact drivers of the solution, differentiate them from the elements that can adapt to context, and then determine fit with the system.

The design and implementation of a Systems Orchestration strategy links to two basic goals:

1. **Adaptation of the Enabling Environment:** Ensuring the enabling environment supports the intervention's long-term durability and scaling.
2. **Adaptation of the Intervention:** Adjusting the intervention's core model and methods, to enable system integration into existing host systems and context.

The work of assessing system readiness should always be done collaboratively, together with the stakeholder core team.

Overview

01 Before assessing system readiness, complete stakeholder mapping to ensure you have a full understanding of the key actors, institutions, and administrative levels relevant to each technical domain and strategic function. The stakeholder map provides essential clarity on who holds responsibility, authority, resources, or influence—laying the foundation for a thoughtful and effective readiness review. Once stakeholder mapping is complete, readiness assessment can proceed in a structured, sequenced way with the stakeholder core team.

02 Review the enabling environment—Examine strategic elements (e.g., policies, procedures, mandates, budgets, skills, logistics) to identify gaps or barriers. Plan internally first. When appropriate, work with stakeholder core team and targeted network partners to decide whether to adapt the intervention or seek changes in the environment, then co-develop strategies for required shifts.

03 Assess suitability—Using insights from your stakeholder map, internally review core components (e.g., milestones, training, logistics). Where needed, collaborate with stakeholder core team and targeted network partners to decide what must remain fixed (fidelity) and what can adapt. Co-create minimum standards and a plan for iterative refinement only after clarity on roles.

04 Audit operational dimensions—After mapping stakeholders and their functions with the stakeholder core team, engage appropriate actors in reviewing each operational dimension (Legal, Strategy, Planning and Budget, Staffing, Technical, Training and Support, Monitoring and Evaluation). Document gaps and co-define next steps toward full system leadership.

Assessing System Readiness Activity: What to Expect

These worksheets guide the CO and stakeholder core team through a rapid appraisal of the existing intervention's practical operation, challenges, and strengths—laying the groundwork to design strategies that fit the real-world system. By working through each worksheet in turn, you'll map current practices, unpack obstacles, and surface assets that will shape a realistic, scaled orchestration plan. Use this one-pager as a quick reference to each worksheet's purpose, structure, and expected outcomes.

DIFFICULTY
Medium

WHAT YOU'LL NEED
Printed worksheets (3.1–3.3)

Pens/markers

Sticky notes

PARTICIPANTS
CARE country office stakeholder core team

Technical advisor

Monitoring and evaluation lead

Key program partners

Note: All worksheets (3.1–3.3) are included in Appendix.

1. **Worksheet 3.1: Current Practices**

   Purpose

   To document each component's objectives, strategies, actors, and indicators — building a shared baseline of what the intervention does, who does it, and how success has been measured so far.

2. **Worksheet Sample 3.2: Current Challenges**

   Purpose

   To identify the obstacles faced by participants, implementers, and institutional actors—highlighting systemic, policy, and operational barriers that could hinder institutionalization and scale.

3. **Worksheet 3.3: Key Assets and Advantages**

   Purpose

   To flip the lens and surface the positive factors—local capacities, partnerships, resources, and incentives—that support consistent delivery and will fuel a successful transition to host-system ownership.

Note:

Once you've completed these assessments, you'll have a clear picture of where to adapt your strategies, strengthen capacities, and leverage existing assets—ensuring your orchestration plan is grounded in the system's realities, roles, and insights to transition the intervention into a host-system–led program at scale.

Enabling Environment

For host system institutions to effectively own, deploy, deliver and finance an intervention, those institutions must collectively have the conditions, capacity, and commitment required for the solution to sustain and scale. Reviewing the key strategic elements of the enabling environment is critical to understanding whether these conditions will support or impede system integration. Follow these steps to diagnose and address any barriers:

1. Scan All Strategic Elements

Begin by reviewing all critical enabling environment elements—policies, procedures, mandates, authority, logistics, partnerships, knowledge, budget, support, skills, staff, tools, and time—with host system stakeholders. For each enabling environment element ask: "Does this facilitate or impede system integration and institutionalization?"

2. Identify Impediments

If any element blocks system integration (for example, implementers lack necessary skills or policies don't permit key activities), decide with host system partners whether to:

- Adapt the intervention (simplify or redesign so current staff can implement without extra training), or change the environment (advocate for new policies, secure budgets, invest in training).
    - *Example 1: If front-line staff lack a needed skill level, either simplify the intervention's technical requirements or train staff and keep the original design.*
    - *Example 2: If activities conflict with existing policies, either alter the intervention to fit current rules or work to update those policies— understanding that each choice affects impact, scale, and timeline.*

3. Re-evaluate and Loop

- After adapting the intervention, re-scan all strategic elements.
- After shifting the environment, re-scan all strategic elements.
- Repeat until no elements impede system integration.

4. Transfer Responsibility

Adapting the intervention and enabling environment will be an iterative process, done in collaboration with host system stakeholders, which takes time. By the time no barriers remain, the host system (led by the government office now serving as Systems Orchestrator) takes full charge of: planning, implementation, supervision and support, budgeting, training, mobilization (participants, partners, resources), monitoring and evaluation, and technical leadership.

Suitability

Successful system integration will likely require adjustments to an intervention's core model and methods. An intervention designed as a donor-funded project often needs redesign to fit a host system's realities, capacities and constraints.

To ensure sustainable scale and local ownership, follow these steps:

- **Compare Core Elements vs. Local Capacity**
  Note that donor-driven projects typically assume larger budgets and stronger NGO capacities. In contrast, host institutions may have, fewer financial resources, more limited technical expertise and different organizational structure.

  For the Systems Orchestration effort to succeed, the CO must work with host system actors to navigate how to remain faithful to the intervention's core elements and impact drivers, while also remaining flexible and realistic about what the host system can deliver.

- **Identify Impediments**
  Work with local actors to decide which aspects of the intervention must remain unchanged (fidelity) and which can flex to local realities. Any of the following aspects of the intervention may need to be adjusted, and all should be reviewed:
  1. Context & Problem Framing
  - Problems and Needs – Is the problem statement still accurate?
  - Program Participants – Are eligibility criteria realistic?
  2. Intervention Design
  - Design Elements – Is the user interface or curriculum localized?
  - Strategies – Do proposed strategies align with local norms?
  - Partnering – Which local partners can champion this work?
  3. Delivery & Operations
  - Timing – Will local schedules and seasons affect roll out?
  - Training and Outreach – Do training modules reflect local workflows?
  - Logistics – Are transportation and supply chains reliable?
  - Resources – Are supplies, equipment, or funds available?
  4. Management & Governance
  - Responsible Institutions and Actors – Who will lead each function?
  - Management – Do roles and reporting lines match local structures?
  - Organization – Can existing teams manage new tasks?
  - Milestones – Can targets be achieved on the same timeline?
  5. Monitoring, Budget, & Durability
  - Measurement – Are monitoring tools feasible in this context?
  - Costs and Budgets – Can local budgets sustain the effort?

Determining which aspects of an intervention demand fidelity and which are best served by flexibility will require a process of experimentation, analysis, and negotiation with all key host system stakeholders. The CARE Country Office and these local actors must work together to define the intervention's minimum standards, and strategies for monitoring, enforcing, refining, or updating these standards.

The 7 Operational Dimensions of Systems Orchestration

A well-designed Systems Orchestration plan addresses seven major operational dimensions, which the host system must commit to leading and sustaining. To understand each dimension and what the Systems Orchestration plan must include to ensure system integration and institutionalization, the CO should review relevant documents and engage deeply with respective stakeholders. These will include those who—formally or informally—have knowledge of, bear responsibility for, and/or are affected by decisions relating to each dimension.

The table below illustrates which stakeholders across the seven operational dimensions should be engaged for a health-related intervention.

Technical Domain	Central Level	Regional Level	Local Level	Stakeholders (Organizations/ Institutions)
Policy Development	Ministry of Health	Health District Offices	Local Health Committees	Ministry of Health, Local NGOs, Advocacy Groups
Technical Leadership	National Technical Agency	Regional Technical Teams	Local Experts, Trainers	Technical Agencies, Local Consultants
Strategic Design and Implementation	Ministry of Planning	Regional Development Offices	Local Administration	Planning Departments, Regional Development Agencies
Monitoring and Evaluation	M&E Coordination Body	Regional M&E Offices	Local M&E Field Teams	M&E Agencies, NGOs, Governmental M&E Offices
Training and Support	National Training Institute	Regional Training Centers	Local Trainers	Training Institutions, NGOs, Local Trainers
Budgeting and Financial Planning	Ministry of Finance	Regional Finance Departments	Local Municipalities	Financial Institutions, Local Governments







Step 4:

Phase Planning Mindset

Step 4: Phase Planning Mindset

There are five key planning phases that shape this stage of the Systems Orchestration process — Validation, Advocacy, Buy-In, Institutional Capacity, and Conceptualization. Approaching these phases with a clear, co-created planning mindset helps align stakeholders around shared goals, roles, and timelines, while remaining flexible to local realities. While these phases often overlap and evolve as learning emerges, treating them as distinct planning areas provides a structured yet adaptive framework to guide collaborative decision-making and ensure critical elements are addressed at every step.

Overview

01 Consider timeline factors. The timeline for Systems Orchestration hinges on four key factors—how long the intervention has been in place, the strength of its evidence base, its technical and stakeholder complexity, and its alignment with current host-system priorities—because mature, well-documented, and context-relevant interventions generally move faster, while complexity or shifting priorities can slow progress. Recognize that Systems Orchestration is a multi-year endeavor and, until the Country Office collaborates with host stakeholders to map and analyze all relevant elements, no precise timeline can
be defined.

02 Roughly sequence five overlapping phases **Validation**— (identify proven interventions, pilot locally, improve, generate evidence, confirm adaptability), **Advocacy** (share evidence, verify alignment with priorities, host exposure visits, introduce technical elements, support policy/budget commitments, mobilize backing), **Buy-In** (establish official structures, agree on implementation/ funding strategy, set system integration steps/timetable, rally stakeholder buy-in), **Institutional Capacity** (build planning, budgeting, resource mobilization, partner engagement, training, technical design, administration, monitoring and evaluation, and leadership), and **Adapting** (tailor costs, inputs, access, logistics, supervision, training, priorities, legal frameworks, participant motivations, and capacities to local realities). Assigning roles and responsibilities begins during the Buy-In phase as part of formalizing structures and agreements. These roles are then operationalized during the Institutional Capacity phase, where actors build the capability to deliver on their responsibilities. Finally, the Adapting phase allows for refining roles to ensure alignment with local realities and emerging needs.

03 Remember that these phases are not strictly linear—they overlap, loop back, and may run in parallel, with validation and advocacy often happening concurrently, and adaptation often beginning before buy-in is complete—but all are aimed at ensuring host stakeholders secure the mandate and gain the capacity, commitment, and confidence needed for ongoing implementation and evolution.

Phase-Planning Mindset Activity: What to Expect

These worksheets help the CO and stakeholder core team crystallize the big-picture vision and get everyone—from CARE and core partners to host system institutions that may be suited to the eventual Systems Orchestrator role—thinking like Systems Orchestrators rather than implementers. By working through prompts on scope, roles, and institutional anchors, you'll build a shared understanding of what the intervention must become once fully integrated and scaled by the system. Use this one-pager to see each worksheet's purpose, structure, and outcomes at a glance.

DIFFICULTY
Medium

WHAT YOU'LL NEED
Printed worksheets (4.1–4.3)

Flip chart or whiteboard markers

PARTICIPANTS
CARE Country Office stakeholder core team

Program manager

Technical advisor

Core system partners (government, CSOs, private sector)

Note: All worksheets (4.1–4.3) are included in Appendix for easy reference.

1. **Worksheet 4.1: Articulating a Vision of the Intervention's System-Led Implementation at Scale**

   Purpose

   To guide the stakeholder core team through envisioning the mature, system-owned version of the proven intervention—defining its key functions, participant experience, and success benchmarks once fully integrated.

2. **Worksheet 4.2: Systems Orchestration Roles and Responsibilities – Stakeholder Core Team Review**

   Purpose

   To specify the institutional sectors (government, civil society, private, external) relevant to the intervention and capture each sector's mandate, authority, primary roles, and intended contributions to system integration.

3. **Worksheet 4.3: Identifying Host System Institutions That Will Be Integral to an Intervention's System Integration and Sustained Scaling (Part 1,2,3,4)**

   Purpose

   To map, by administrative level (central, regional, local), which institutions will own the seven operational domains—policy, planning, coordination, technical strategy, training, monitoring and evaluation, and financing—both now and post-integration.

Note:

Completing these worksheets will equip you with a clear articulation of the end-state intervention, the right mix of institutional partners, and the groundwork for formalizing roles, responsibilities, and resources in your full Systems Orchestration plan.

Planning Ahead: Phases and Timeline

Systems Orchestration is not a linear checklist but a multi-year process built on collaboration and co-creation. Each major phase—from **Validation to Advocacy, Buy-In, Institutional Capacity, and Adaptation**—must be shaped alongside government agencies, NGOs, community groups, private sector partners, and donors. Because every context is unique, these phases often overlap or run in a different order. No one can prescribe a universal schedule; instead, a CARE Country Office must chart its own path by deeply engaging local actors and understanding the landscape on the ground.

Factors That Shape the Timeline

Several key factors determine how long the Systems Orchestration process will take:

1. Intervention Maturity

A well-established program that has operated in the host system for years typically moves faster toward local ownership, since partners already know how it works, have tested its impact, and trust its value. In contrast, an intervention that is proven in other contexts but new to the host system often needs extra time for partners to learn the model, adapt it to their setting, and build confidence.

2. Accumulated Evidence

Interventions with more history usually have richer data and success stories to share, which makes it easier to demonstrate how the intervention fits local institutions' own goals and priorities — increasing the likelihood they choose to adopt and scale it because it solves a problem they already own. Gathering, analyzing, and packaging compelling sectoral evidence into clear, persuasive reports requires time, careful data collection, and collaboration with host actors.

3. Intervention Complexity

Complexity arises from three main sources:

a. technical intricacies (multiple tools or protocols),
b. the number and diversity of stakeholders (government departments, NGOs, community groups), and
c. the nature of funding streams (multiple donors or budget lines).

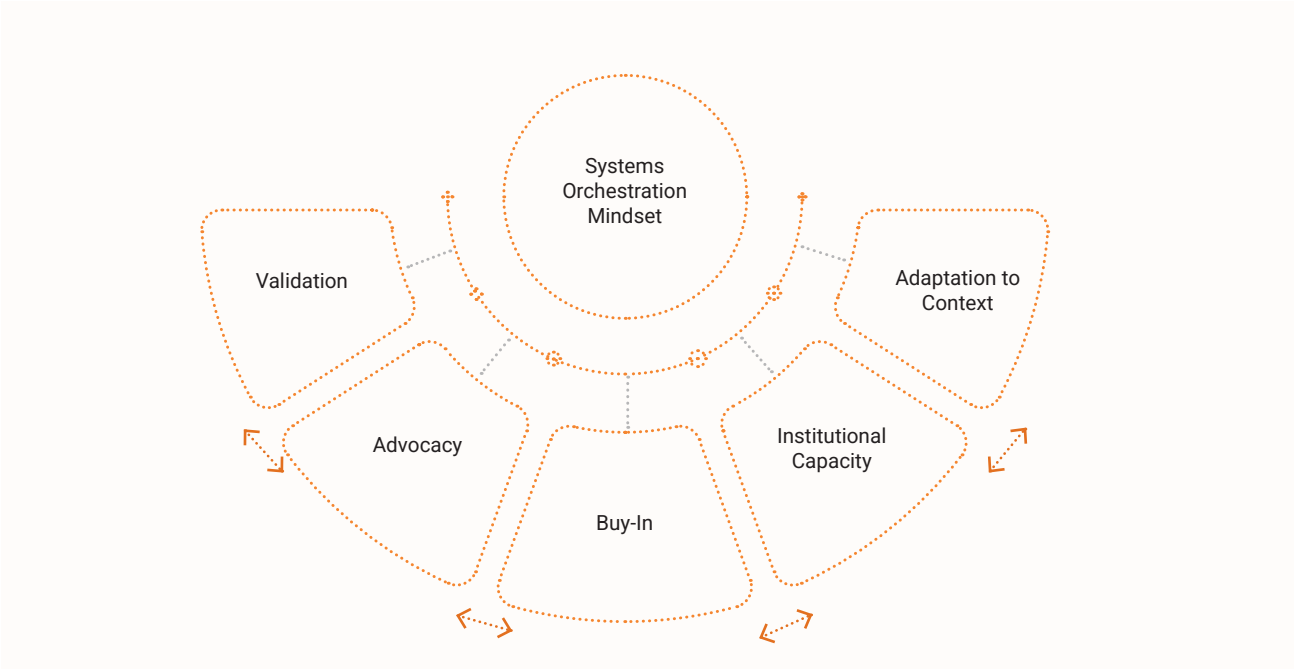
More layers of complexity mean more coordination, capacity-building, and strategic alignment. Paradoxically, an intervention that seems simple can still take longer if it overlooks critical program elements or leaves out key stakeholders who later must be brought on board.

4. Alignment with Host-System Priorities

Even a mature, well-evidenced, and technically straightforward model can stall if it does not address local leaders' top priorities. Frequent turnover among leaders and shifting political agendas can complicate commitment. Framing the intervention as a tool to help leaders achieve their own goals—rather than as an external project—accelerates buy-in and makes sustained adoption more likely.

Sequencing: Conceptual Framework

Figure 5: Systems Orcherstration Mindset Phases



Phase 1: Validation

Identify proven intervention that aligns with local needs and host system priorities, demonstrate that the intervention can be adapted and effective within local contextual realties, and that it is affordable. Major actions include:

a. Examine sector's best evidence for interventions proven to yield host system's priority outcomes.
b. Pilot the model in the local context settings.
c. Refine the approach based on feedback.
d. Generate credible evidence of impact (data, case studies).
e. Confirm the model's adaptability to local realities.

Phase 2: Advocacy

Transform "proof of concept" into official support. Major actions include:

a. Share evidence and success stories with decision-makers.
b. Verify intervention alignment with host system priority outcomes.
c. Organize exposure visits or site tours for key stakeholders.
d. Introduce technical elements (tools, protocols) to government champions.
e. Support government-led alignment of policy and budget commitments.
f. Mobilize political, practical, and financial backing from peer governments and technical partners.

Phase 3: Buy-In

Embed the intervention into formal policies, work plans, and budgets. Major actions include:

a. Identify or establish a coordinating body (e.g., steering committee).
b. Agree on a co-created strategy and funding plan.
c. Define a clear timeline for system integration (e.g., "By Q2 next year).
d. Secure strategic, financial, and political commitment from all stakeholder groups.

Sequencing: Conceptual Framework

Phase 4: Institutional Capacity

Build local systems and skills so host institutions can run the intervention independently. Major actions include:

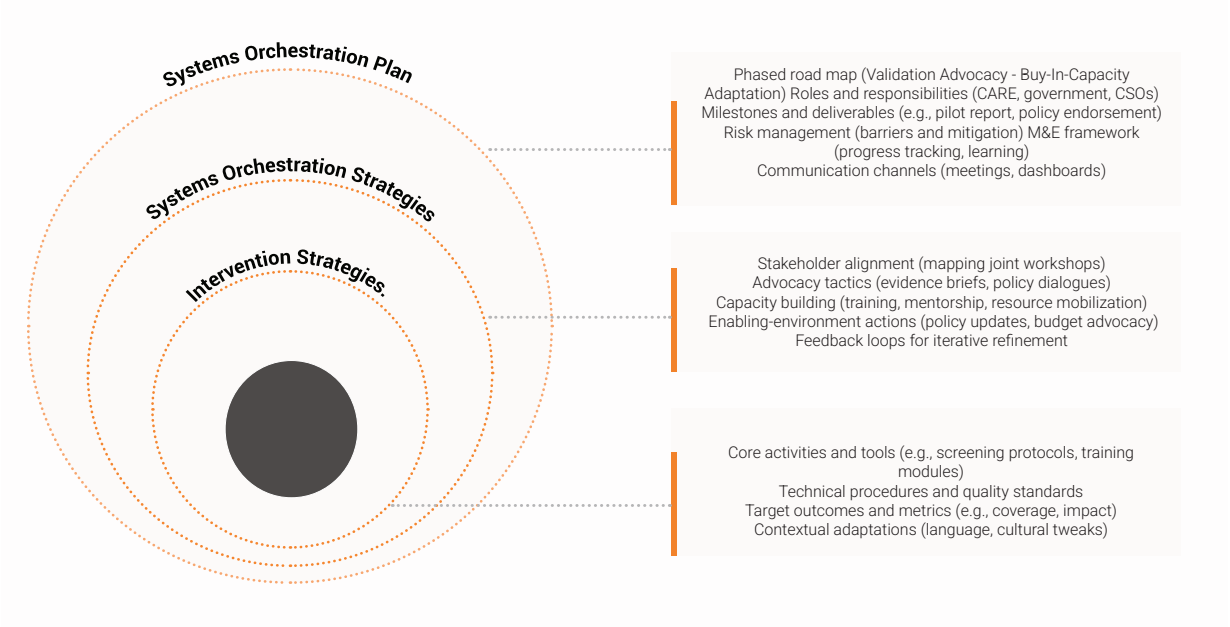
a. Strengthen planning and budgeting skills within host institutions.
b. Support local resource mobilization (identify durable funding sources).
c. Deepen partner engagement (formalize roles, responsibilities, and coordination mechanisms).
d. Roll out comprehensive training programs and ongoing support systems.
e. Finalize technical design documents for local use.
f. Build administrative and management processes (procurement, staffing).
g. Establish robust monitoring and evaluation systems
h. Cultivate local technical leadership through mentor ship and capacity-building.

Phase 5: Adaptation to Context

Ensure both the intervention and its enabling environment truly fit local realities. Major actions include:

a. Adjust costs, materials, and inputs to match local budgets.
b. Tailor service access and logistics to local infrastructure and community norms.
c. Revise supervision practices and training methods for on-the-ground conditions.
d. Update legal frameworks or system priorities where needed.
e. Align participant incentives and motivations.
f. Work with host institutions to tweak policies, procedures, or practices that hinder success.

Figure 6: Systems Orcherstration Conceptual Framework



CASE STUDY: Scaling VSLAs to Expand Access to Savings and Credit in Rwanda



Objectives and Outcomes

The primary objective of the Village Savings and Loan Associations (VSLA) scaling effort in Rwanda is to expand access to savings and credit ensuring that all Rwandans, particularly women in rural and underrepresented areas, have access to and utilization of both formal and informal financial services by 2024. This involves increasing adult Rwandans' financial and digital literacy, expanding uptake of formal financial services, and improving the appropriateness, affordability, and diversity of available products—especially digital offerings.

Strategies and Actions

To achieve these goals, the program first identifies populations with little or uncertain access to savings, credit, or insurance (such as rural women, refugees, youth, and persons with disabilities) and organizes them into VSLAs. Members of these groups receive financial literacy training and support in using digital financial tools, thereby preparing them to link with formal financial institutions (banks, micro-finance, and insurance providers). Simultaneously, the program works closely with these formal providers to design and deliver tailored financial products suited to VSLA members, while engaging government and financial regulators to enact policies, subsidies, or incentives—such as simplified Know Your Customer (KYC) processes or capacity grants—that lower barriers to formal services.

Actors and Roles

Key implementers include government institutions (e.g., Ministry of Finance and Economic Planning, National Bank of Rwanda, district offices), faith-based

organizations, formal financial institutions, local administrations, and both local and international NGOs. Village agents and VSLA groups themselves play a central role in mobilizing members, facilitating weekly savings meetings, and managing group lending. The participants are financially excluded adults—especially women—across all settings, with special emphasis on refugees, youth, and persons with disabilities, as well as current VSLA members.

Measurable Indicators

Critical indicators track progress through metrics such as the number of active VSLA groups and members, disaggregated data by sex, age, and other participant characteristics, and additional possible indicators tracked depending on program scope and data availability (e.g., value of savings mobilized by VSLAs, number and value of loans issued within VSLA groups, loan repayment rates, linkages to formal financial services, capacity-building sessions delivered to VSLAs and policy adoption or integration into national strategies for improving access to financial services).

VSLA System Integration

The Systems Orchestration process for embedding VSLA implementation, financing and scaling within the host system requires sequential yet overlapping phases. During the **Validation** phase, pilot VSLA groups are formed in select communities, feedback is used to refine the VSLA facilitation model, and evidence of initial impact—such as increases in savings rates and literacy gains—is gathered. In the **Advocacy** phase, success stories and data are shared with decision makers (e.g., MINECOFIN, BNR, and district leadership) to secure policy commitments, budget allocations, and institutional support. The **Buy-In** phase formalizes these commitments by embedding the VSLA model into national and district plans, establishing a multi-stakeholder steering committee, and aligning budgets for ongoing support. In the **Institutional Capacity** phase, a Training-of-Trainers program is rolled out to build district-level facilitator expertise, banks are trained to manage small-value VSLA accounts and digital wallets, and robust monitoring and evaluation systems are established to track membership growth, savings volumes, loan disbursements, and literacy outcomes. Finally, during the **Adaptation to Context** phase, products and services are tailored to local contexts—adjusting costs, input requirements, and logistic approaches—while legal and policy frameworks are updated (for example, granting VSLA groups streamlined mobile money registration). Pilot adaptations in remote areas, such as offline digital wallet solutions, are tested and refined to ensure the intervention's continued relevance and scalability.

Durability and Collaboration

Ultimately, success hinges on close collaboration among all host system actors to ensure that VSLA members gain not only access to financial services but also the capacity, confidence, and official support needed for durable, locally driven impact. CARE continues to provide technical and capacity-building support to local actors as they become the owners, financiers and implementers of the VSLA scaling effort.



Stage 2 : Design

In Design Stage, the focus shifts from exploring “what is” to co-creating “what will be.” Whereas the Preparation Stage involved only the CO and the stakeholder core team, in the Design Stage the broader ecosystem of relevant stakeholders is engaged in the co-creation process. Building on the validated evidence and stakeholder commitment secured in Design, country teams and system actors collaborate to craft a shared vision, actionable strategies, and clear accountability structures for integrating the intervention into existing systems.

COs will define a common purpose and success criteria, co-design strategies, and assign roles and governance.

This stage will help you answer

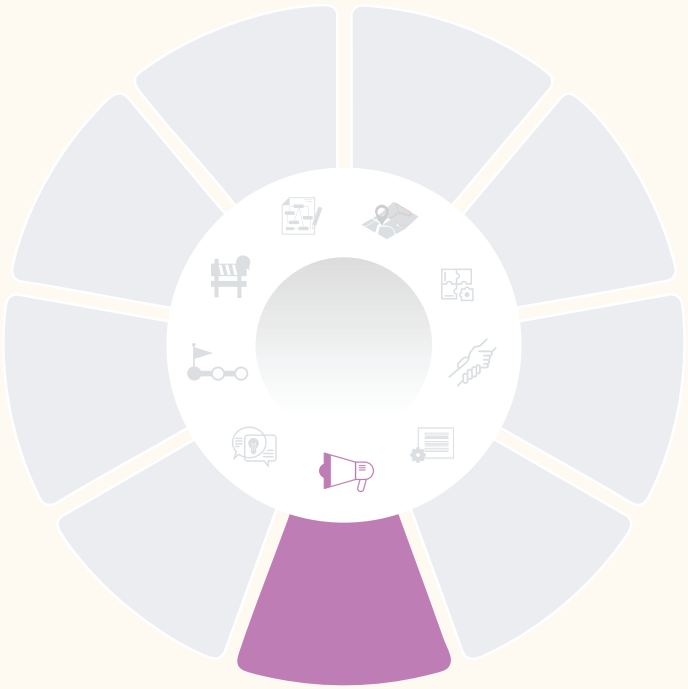
Goals and Success Measures: A clear articulation of what the intervention aims to achieve, and the indicators that will define success.

Strategies and Activities: The specific strategies and actions that will translate shared goals into reality, while staying true to core principles and adapting to local needs.

Roles and Responsibilities: The leaders, supporters, and funders for each part of the plan, and how decisions will flow across government, NGOs, private sector actors, and communities.

Governance and Coordination: The structures required to ensure alignment, accountability, and the ability to iterate as learning emerges.

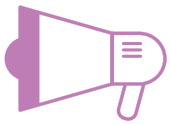






Step 5:

Define Program Purpose & Core Outcomes



Step 5: Define Program Purpose & Core Outcomes

There are two key focus areas that shape this stage of the Systems Orchestration process — **Program Purpose and Core Outcomes.** Approaching these with a clear, co-created planning mindset helps align stakeholders around a shared vision, measurable success criteria, and priorities for scale and durability, while remaining flexible to local realities. While program purpose and outcomes may evolve as learning emerges, treating them as distinct planning areas provides a structured yet adaptive framework to guide collaborative decision-making and ensure critical elements are addressed at every step.

Overview

When working as a Systems Orchestrator to transfer ownership of a proven intervention to host system

01 stakeholders, start by clearly co-defining the goals being targeted and how success will be measured. By focusing on outcomes or problems to be solved rather than fixed strategies or solutions, the host system can adapt and improve the intervention as the context, resource constraints, and needs of program participants evolve.

02 Identify core outcomes that represent the specific results the intervention seeks to achieve at both the participant and system levels. Ensure these outcomes align with system priorities and reflect both quality and scale.

03 Select measurable indicators that will track progress toward core outcomes. Indicators should provide actionable insights for monitoring, learning, and adaptation over time.

04 Ensure that the purpose, outcomes, and indicators are revisited periodically to stay aligned with evolving contexts, new evidence, and changing system capacities.

Define Program Purpose & Core Outcomes Activity: What to Expect

Step 5 is guiding you through co-defining the program's purpose and core outcomes. These two complementary sessions build on each other—starting with front-line insights, then co-creating a shared purpose, agreeing on measurable outcomes, validating them with stakeholders, and finally reflecting on alignment—so that your Systems Orchestration plan rests on a robust, consensus-driven foundation.

DIFFICULTY
Medium

WHAT YOU'LL NEED
Pilot evaluation report for the intervention or key data summaries

Flip charts or digital whiteboard

Reflective questions to define program purpose and outcomes

Printed worksheet template ("Elaborating a Program's Core Outcomes and Indicators)

Marker pens or collaborative editing tool

PARTICIPANTS
CARE Country Office core team (program manager, monitoring and evaluation lead).

Representatives from key host institutions (policy, finance, technical leads).

At least one front line implementer and one participant or community leader.

Note: All worksheets (5.1–5.3) are included in Appendix for easy reference.

1. Consultation Session 5.1: With Front–Line Stakeholders

Purpose

Before defining purpose, gather motivations, challenges, and needs from program participants and implementers.

2. Workshop Session 5.2: System-integration Scoping

Purpose

With the broader ecosystem of relevant stakeholders, translate the purpose into specific outcomes for participants and the system; assign indicators, baselines, and targets.

3. Worksheet 5.3: Elaborating a Program's Core Outcomes and Indicators

Purpose

Use in your Systems Integration Scoping Workshop to capture, refine and validate your program's core outcomes, indicators, and related measurement details before moving on to strategy design.

Note:

Work sequentially—start with Activity 5.1 (front-line sessions), followed by Activity 5.2 (system-integration scoping workshop) and conclude with Activity 5.3 (Elaborating a Program's Core Outcomes and Indicators worksheet).

From Outcomes to Ownership: Orchestrating Host System Institutions for Scalable, Durable Impact

Before designing a Systems Orchestration strategy, you must first pinpoint the program's intended outcomes and how you will measure them—because scaling often requires adapting or even overhauling the strategies that worked during the pilot/project phase. Review your original theory of change with the broader set of key system actors, asking: "What will change as CARE shifts from direct implementation to orchestrating and supporting host system stakeholders to own and scale the solutions?"

This discussion should surface how desired outcomes may be altered by the realities of new contexts, limited per-participant resources, evolving participant needs, and alternative partner approaches. This will help determine whether near-term simple tweaks or major adjustments to the intervention are needed for durable, system-wide impact.

As CARE shifts from direct implementation to orchestrating and supporting host institutions, the emphasis of CARE's direct work shifts to systems change—strengthening stakeholders' institutional and strategic capacity, shaping policies, plans, and resource allocation, and clarifying roles. In the long-term, only systems change can ultimately deliver an enabling environment that supports the host system to successfully deliver the intervention with quality, scale, and the right balance of fidelity and flexibility. Beyond participant impacts, there are two critical outcomes that success hinges on: (1) host institutions must take full ownership of planning, funding, implementation, and learning; and (2) partners and resources must be mobilized to sustain and expand the intervention at scale.

Key Considerations

The articulation of the core outcomes of an intervention's Systems Orchestration strategy will require that a CARE Country Office work to focus the attention of the key system stakeholders on a few fundamental factors. At the same time, it will be important to keep in mind CARE's broader, crosscutting development domains. Each of these—factors, stakeholders, and cross-cutting domains—are explored in more detail below.

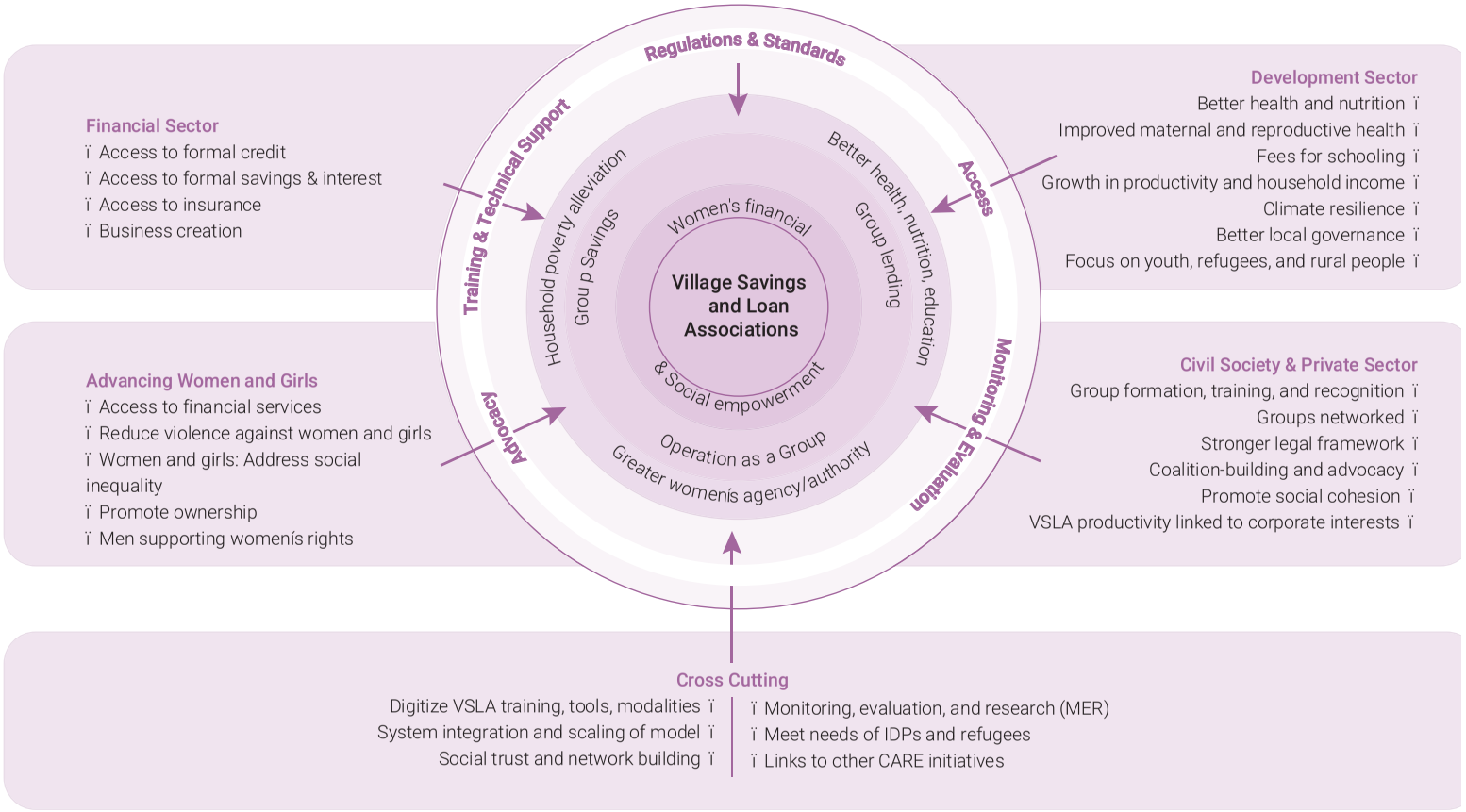
Key Consideration	What CARE and Core Allies Will Do	What the Host System Will Do
Review Critical Elements	Review the original implementation plan and agreements. Update documented outcomes and metrics.	Confirm which host institution will own the updated outcomes and metrics going forward.
Assess Main Factors	1. Map the needs, capacities, and motivations of participants 2. Review the authorities' priorities, interests, and skills 3. Check resource, market, and service access 4. Examine similar or complementary initiatives 5. Spot new opportunities and challenges 6. Re-evaluate the intervention's promise and potential adaptations	Validate findings against the host system's own priorities and constraints; flag where they diverge.
Engage Key Stakeholders	Convene all relevant government, local leaders, CSOs, private sector, front-line agents, and participants.	Identify and formally designate who will lead convening these stakeholders once CARE steps back.
Incorporate Broader Development Objectives	Ensure outcomes and indicators cover poverty reduction, advancing women and girls, participation, civic engagement, and market linkages.	Confirm which of these objectives the host system can realistically fund and sustain at scale.

CASE STUDY: VSLA System Integration Objectives and Indicators for CARE Rwanda



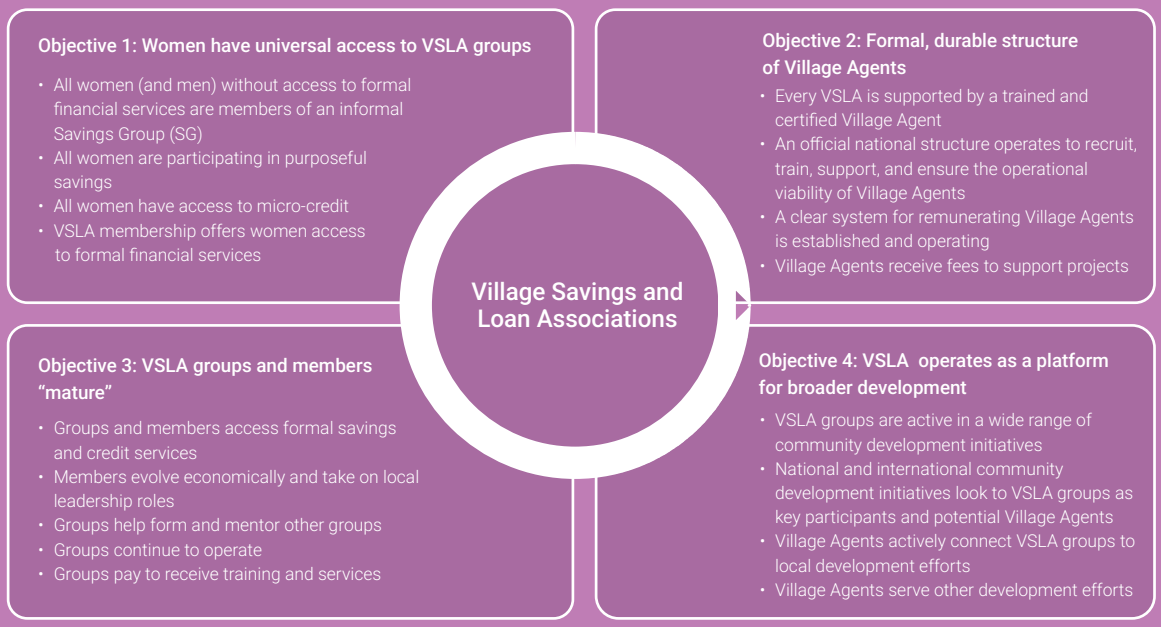
Beginning in December 2022, CARE-Rwanda was supported by Geneva Global to elaborate a Systems Orchestration plan to drive the system integration and sustainable scale of the VSLA program by Rwandan host system institutions spanning government, private sector and civil society. Building on CARE's internal VSLA program framework, the CO team initially outlined a clear vision of the intervention, outlining core components, goals, technical focus areas, and strategic objectives, as shown in the graphic below.

Figure 7. Internal VSLA Program Framework for CARE Rwanda



CARE Rwanda then convened a group of government, civil society, and private sector actors to review and validate CARE's internal perspective on the aims of VSLA and to complement these with a set of concrete outcomes to achieve with system integration. These are captured in Figure 8, below.

Figure 8: VSLA System Integration Objectives for CARE Rwanda









Step 6 :

Co-Creating Systems Orchestration Strategies



Step 6: Co-Creating Systems Orchestration Strategies

Articulating strategies to achieve scaled impact through system integration and institutionalization requires equal focus on both the technical solution and its institutional adoption by key stakeholders. It's not enough for a system to adopt the intervention as official policy or include it in plans. Strategies must clearly define responsibilities and actions across all parts of the institutional structure needed to make the intervention work in practice. Building consensus around these strategies is essential to ensure stakeholders understand their roles and are committed to implementation.

01 Overview

When developing a program, it is important first to identify and articulate the core outcomes and strategies required to achieve those outcomes. This includes considering both what each stakeholder must do to implement the intervention and how they will do it. From a Systems Orchestration angle, it includes thinking through what activities the system actors must have the capacity and commitment to deliver, and how CARE and other partners will ensure the system is equipped to do those activities.

02

When developing key strategies, it's important to think through both the intervention's technical components and the work required by system actors. This includes training, support, recruitment, outreach, monitoring, and evaluation—everything the host system needs to make the intervention work in practice, and to connect the intended participants to the services or products it offers.

03

Striking the right balance between staying true to the intervention's non-negotiable core elements and allowing flexibility in strategies and goals is key to long-term impact and durability. As conditions change, the intervention must be able to adapt.

04

Once you've locked in core outcomes, outline the exact mix of "product" and "process" steps that drive them. Document your initial strategies and workflows as a baseline, then flag which actions must stay intact to safeguard impact and which can adapt as you shift into system-led scale. This fidelity-flexibility mix guarantees essential program elements endure, even as contexts change.

Co-Creating Systems Orchestration Strategies Activity: What to Expect

These two complementary sessions guide your team in translating core outcomes into actionable strategies—balancing technical "product" elements with the institutional "process" steps needed for scale. By working through front-line consultations first, then system-integration scoping workshops, you'll surface practical insights and build stakeholder consensus on the strategies that will drive durable impact.

DIFFICULTY
Medium

WHAT YOU'LL NEED
A clear outcomes list from step 5.

Existing strategy and operations documentation,

Visual collaboration tools (flip charts or digital workspace),

"Key Strategies" worksheet, Reflection question guide.

PARTICIPANTS
Key CARE staff (program lead, technical advisor, monitoring and evaluation),

Institution representatives (ministry units, district managers),

Front-line implementers (e.g., VSLA agents),

Partner coordinators (NGOs, private sector),

Consensus facilitator and note-taker.

Note: All worksheets (6.1–6.3) are included in Appendix for easy reference.

1. **Consultation Sessions 6.1: Front–Line Stakeholders**

   Purpose

   Surface practical actions and resource needs by confirming which strategies participants and implementers use, what motivates or hinders them, and what improvements they recommend.

2. **Workshop Session 6.2: System-integration Scoping**

   Purpose

   Validate and refine the front-line-informed strategies with senior and sector stakeholders, flagging which require strict fidelity and which can adapt, and assigning institutional roles for each.

3. **Worksheet 6.3 Defining Key Strategies to Achieve Systems Orchestration Objectives**

   Purpose

   Turn the agreed-upon strategies into a detailed, actionable framework by fleshing out each core outcome's technical elements, operational processes, fidelity/flexibility requirements, stewardship roles, and resource needs.

   Note:

   Work in sequence—first complete Consultation Sessions 6.1: Front–Line Stakeholders, then Workshop Session 6.2: System-integration Scoping, and finally Worksheet 6.3 Defining Key Strategies to Achieve Systems Orchestration Objectives. This ensures your strategies are grounded in front-line realities, validated by stakeholders, and fully detailed before moving to Step 7.

Key Considerations

First, stakeholders should classify original strategies into three groups—**must-keep, optional, or unsuitable for scale**—and identify any new approaches worth adding.

Next, flag each strategy for fidelity (non-negotiable) or flexibility (open to adaptation). Beyond the intervention itself, focus on how the lead government orchestrator and partners will embed these strategies—building system capacity and commitment for lasting integration and impact. In doing so, pay special attention to:

Key Consideration	What CARE and Core Allies Will Do	What the Host System Will Do
Technical Elements	List the core program "products" (services, tools, platforms) and "processes" (operational steps) that define the intervention, then validate which are core impact drivers that are essential for scaled delivery, and which can be flexible depending on local conditions.	Formally adopt the finalized set of core elements as official technical standards or guidelines, and designate which host-system institution or unit owns each element going forward.
Technical Assets	Inventory all documentation (guides, templates, modules), equipment, digital tools, and platforms; verify their suitability at scale and plan updates or additions required for host institutions to operate independently.	Take formal ownership of the documentation, tools, and platforms as institutional assets, and allocate the budget and staff needed to host, maintain, and update them without CARE.
Training	Define training curricula for participants, trainers, supervisors, and partners; detail content, delivery methods, schedules, and resources; ensure it builds both competence and confidence in the system.	Integrate the curricula into existing host-institution training systems (e.g., pre-service or in-service training), and assign host-system trainers or training institutions to deliver and update it going forward.
Technical Support	Map how front-line agents will receive ongoing coaching, supervision, and troubleshooting from official structures—establish clear feedback loops and supportive supervision mechanisms for quality assurance.	Establish or designate official supervision structures (e.g., field supervisors, district/regional offices) to take over ongoing coaching and troubleshooting, replacing CARE's role over time.
Mobilization and Motivation (Participants)	Identify channels and agents responsible for outreach and participant engagement; design incentive mechanisms and communication strategies to attract and retain program participants.	Designate host-system channels and agents (e.g., community health workers, extension agents, local officials) to lead outreach and participant engagement, funded through public or local budgets.
Recruitment and Retention (Front-line Agents)	Outline recruitment criteria, incentive structures, and support systems to attract and retain qualified volunteers or staff responsible for participant training and support.	Own recruitment criteria and incentive structures within existing civil-service or institutional human resources systems, ensuring front-line roles are funded and staffed beyond CARE's support.
Monitoring and Evaluation	Specify which implementation and outcome data to collect, assign roles for data gathering and analysis, and determine how findings will be shared with decision-makers to drive continuous improvement and consistent program support.	Integrate data collection and review into official host-institution monitoring and evaluation systems and decision-making cycles, with host-system staff responsible for data use and reporting.

CASE STUDY: Farmer Field and Business School Strategies, Nepal

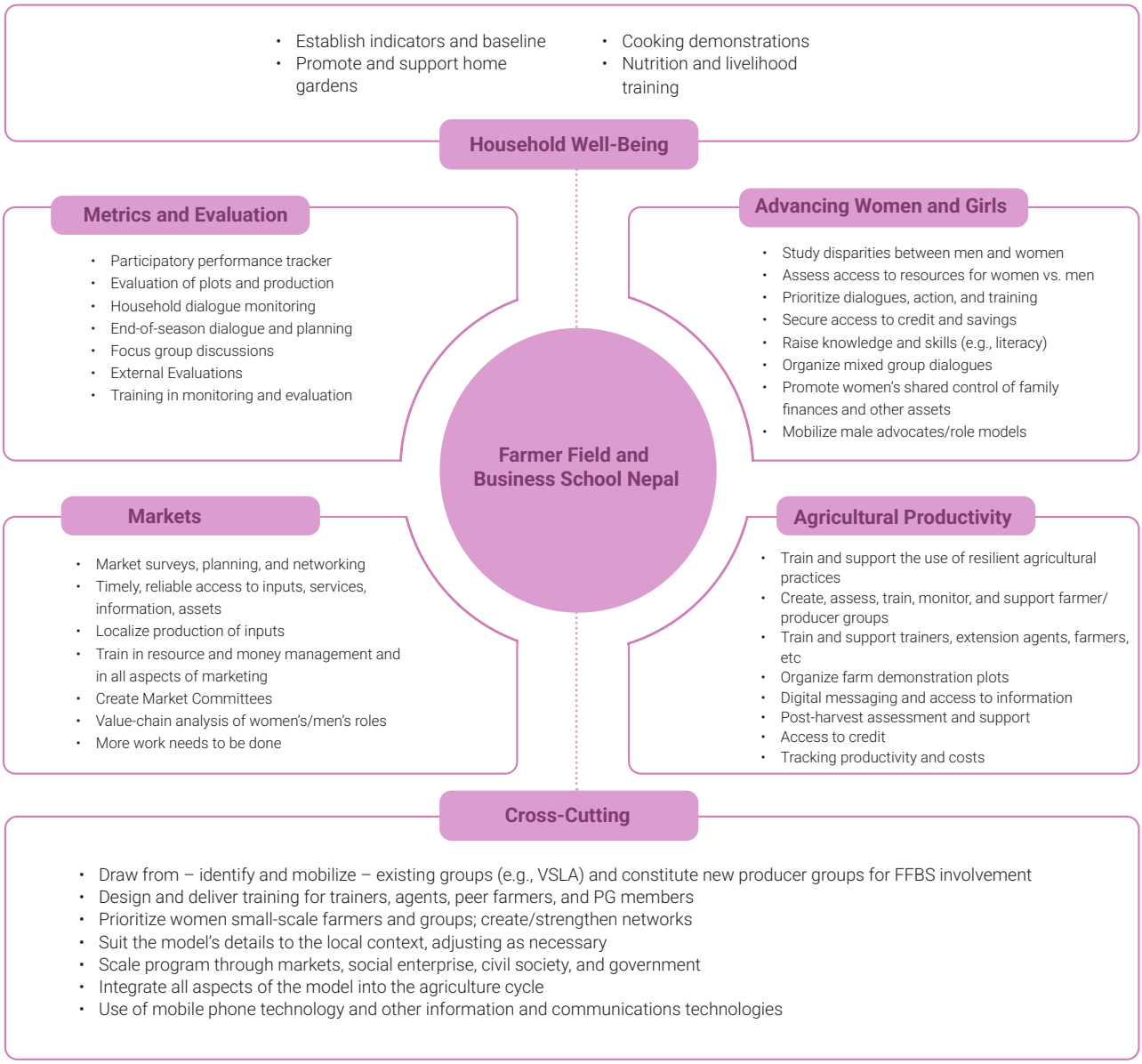


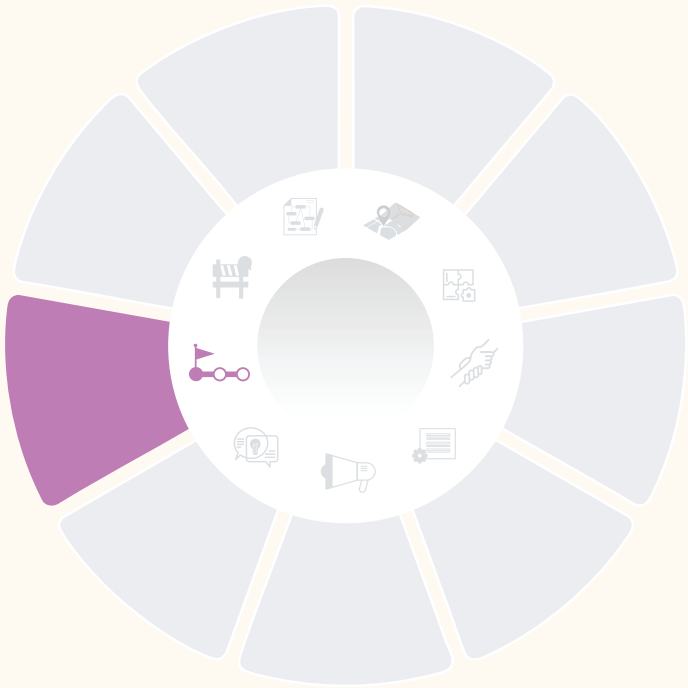
CARE Nepal was supported by Geneva Global to elaborate a plan for the system integration and scaled impact of CARE's Farmer Field and Business School (FFBS) program. The FFBS program in Nepal differed from VSLA in Rwanda in three fundamental ways.

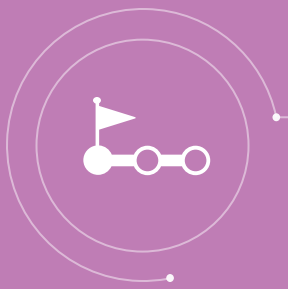
1. FFBS incorporates a larger number of technical components: agricultural production, agricultural value chains, household well-being, and advancing the rights of women and girls.
2. CARE was newly introducing the FFBS program into Nepal, while CARE Rwanda had operated VSLA there for over a decade.
3. Linked to the time factor, the implementation of FFBS in Nepal was focused on just two municipalities in only one province whereas VSLA had at the time reportedly achieved over 90 percent infiltration in Rwanda.

Despite these differences, the process for finding consensus in the identification of strategies was quite similar, leading to the following results for FFBS in Nepal:

Figure 9: Farmer Field and Business School Strategies

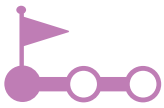






Step 7 :

Identify Stakeholder Roles & Functions



Step 7 : Identify Stakeholder Roles & Functions

No strategy succeeds without the right institutions and actors carrying it out. Step 7, therefore, focuses on ensuring every stakeholder tied to each strategy clearly understands their role, commits to it, and has the capacity to deliver. As you work through identifying roles and functions, consider stakeholders by sector, strategic function, and administrative level—across all technical domains—to build a fully accountable orchestration team.

Overview

01 Comprehensive Stakeholder Scan: List all actors—technical, administrative, political, operational, and others—whose support or opposition could make or break system integration at scale. Don't overlook those with indirect but influential roles.

02 Role Clarity and Commitment: For each stakeholder, define clear responsibilities and secure their formal commitment. Ensure they have—or can develop—the authority, skills, and resources needed.

03 Coordination Mechanisms: Establish bodies (e.g., steering committees) or processes to

i. Secure the policies, procedures, and resources needed for smooth implementation.
ii. Foster collaboration and information-sharing among stakeholders, especially when they've never worked together.
iii. Hold all partners accountable for their individual and shared responsibilities.

Identify Stakeholder Roles & Functions Activity: What to Expect

These worksheets and workshops guide your team in mapping who will own, support, and coordinate each critical orchestration function—ensuring every stakeholder understands and commits to their role in driving system integration and scaled impact. Use this one-pager to grasp the session flow, required inputs, and expected outputs.

DIFFICULTY
Medium

WHAT YOU'LL NEED
List of operational domains and strategic functions (from Step 6)

Stakeholder core-team list (Worksheet 2.4)

Flip charts or digital mapping tool, markers, sticky notes (or virtual equivalents)

Appendix : Key Questions and Worksheets for Step 7

PARTICIPANTS
CARE core team (program manager, monitoring and evaluation lead, technical advisor)

Sector representatives (government, CSOs, private sector)

Administrative leaders (national, regional, local)

Partner liaisons (NGOs, international agencies)

Facilitator and note-taker

Note: All Step 7 worksheets and reflection prompts are included in Appendix for easy reference and print-out.

1. Workshop Session 7.1: Key Stakeholders Roles and Responsibilities

Purpose

Map each operational domain—policy; planning and budget; partnership and coordination; technical strategy; training and support; monitoring and evaluation—and confirm which institutions have primary and secondary authority. Agree on coordination approaches where mandates overlap. Record, by administrative level (central, regional, local) and actor type (government, civil society, private sector, other), who will lead and support each operational element once system integration begins—and flag any gaps.

2. Worksheet 7.2: Identifying Stakeholder Roles and Responsibilities (Part 1, 2)

Purpose

To work with your full stakeholder group—organized by sector and administrative level—to define the main strategic dimensions for each orchestration responsibility (policy, planning, technical design, monitoring and evaluation, etc.) and list which actors will fill those roles. To surface each host institution's current capacities, gaps, and questions around assuming financial and operational responsibility—using targeted prompts that kick off deeper dialogue on staffing, resources, and governance.

3. Worksheet 7.3: Orchestration Functions and Their Responsible Sectors

Purpose

To lay out the eight core orchestration functions (e.g., standardization, validation, training, coordination) and mark which sectors (government, CSO, private, international) will play a primary (X), secondary (x), or no role—ensuring no function is left unassigned.

Key Considerations

New initiatives often fail to endure or scale due to uncertainty or indecision about who is responsible for advancing the intervention and its strategic components. This responsibility may lie with an institution, a group of institutions, specific units within them, or individuals in those units. Before investing in capacity-building for implementation or management, it's essential to clearly identify who will oversee each aspect of the intervention.

Since successful implementation typically involves actors from different units—and often different institutions—it's equally important for all partners to agree on how they will consult and coordinate to ensure alignment and program success.

Operational Elements and Responsible Stakeholders

This section offers guidance for the Systems Orchestration process to help identify the right actors for each required action and decision—the "operational elements"—and to ensure that coordination and accountability mechanisms are in place.

Operational Elements

Every successful intervention is built on a coordinated set of operational elements. These include core technical strategies, methods for introducing strategies into practice, and the many behind-the-scenes administrative tasks and decisions that keep the intervention running.

The operational elements that make the overall intervention work fall into two categories:

i. Enabling aspects set the parameters and create the conditions for effective implementation. They include policies that authorize, contextualize, or mandate an intervention, plans and budgets for its strategic road map, and partnerships and coordination that ensure all critical components are aligned.
ii. Functional aspects involve the methods and actions stakeholders use to achieve the intervention's intended outcomes. They include the intervention's technical strategy, the range of training and support for diffusion and uptake, monitoring and evaluation of progress and impacts, and the administration and management of these sustained efforts.

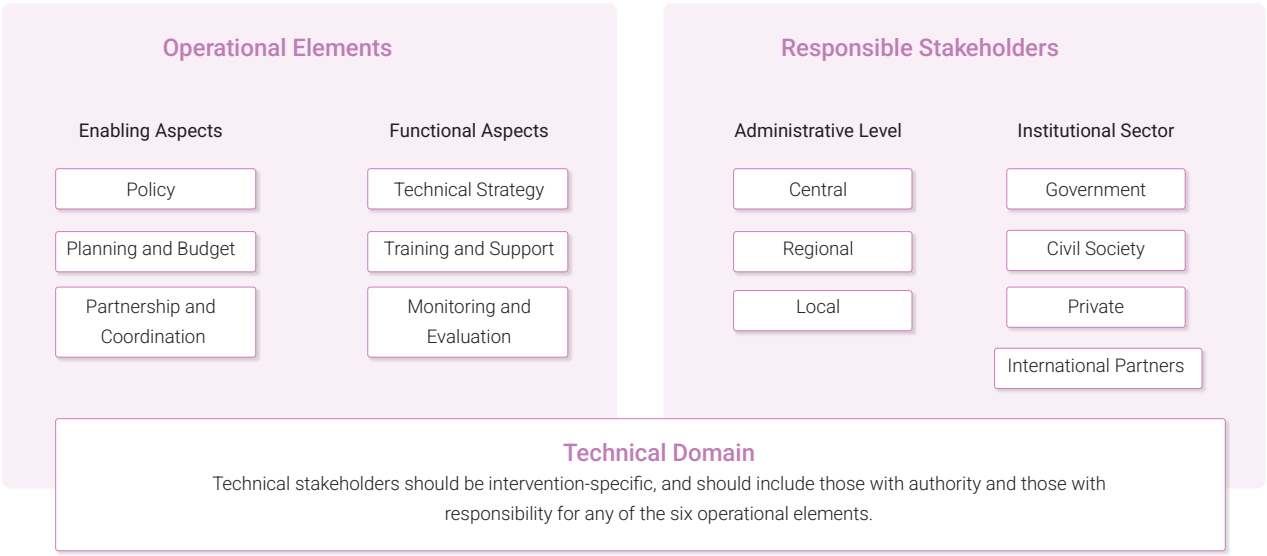
Determining the details of these enabling and functional aspects is essential to Systems Orchestration.

Without a clear and thorough understanding of the operational requirements for successful implementation, it's difficult to identify and prepare the agents, decision-makers, and stakeholders who will be responsible for executing and scaling the intervention as Systems Orchestration advances and system integration is achieved.

Responsible Stakeholders

Responsibility for functional aspects typically involves operators who sit across various stakeholder institutions. Ideally, the roles each one plays in successfully implementing the intervention is clearly defined and coordinated. Sometimes, however, they may overlap or even conflict. A key goal of Systems Orchestration is to clarify and assign roles to optimize coordination and synergy while reducing redundancy and friction.

Figure 10: Operational Elements and Responsible Stakeholders



Identifying the stakeholders who will have authority over and operational responsibility for an intervention requires equal attention to all administrative levels (national, regional, local), across all institutional sectors (government, civil society, private, and international), and all relevant technical domains

Each operational element of an intervention must have a clear "home" in at least one stakeholder institution. For example, in Nepal's FFBS, agriculture may fall under the central Ministry of Agriculture, women's empowerment under the Ministry of Women, Children, and Senior Citizens, while coordination rests with municipalities and districts—for now. Every stakeholder must formally accept its role and possess the capacity, capability, and commitment to fulfill it effectively and on time. Additionally, one stakeholder or a group of partners should ensure cross-stakeholder consultation and coordination to meet all responsibilities, potentially through steering committees at various administrative levels.

Responsibility and authority don't always overlap. Authority refers to stakeholders empowered to make decisions—such as setting policy, planning, budgeting, and assigning personnel. Responsibility lies with those who ensure

these decisions lead to effective action, whether by implementing directly or supporting implementers. When responsibility isn't paired with at least some authority, the ability to take decisions and act is often compromised.

The following graphic simplifies the complex choreography linking the full group of key stakeholders to these essential operational elements and to one another.



Figure 11: Operational Framework

All stakeholders contribute to implementing core operational elements, which are grouped into enabling and functional aspects at the center of the diagram. Responsibility is distributed across three main institutional actors—government, civil society, and private sector—at the central, regional, and subregional levels. International stakeholders, positioned outside the system, provide support where useful.

The graphic also shows that stakeholders operate across various technical domains, including both the intervention's primary domain and any ancillary domains. In the case of FFBS in Nepal, agriculture is the main domain, while women's empowerment, nutrition, financial services, and others comprise the ancillary ones.

CASE STUDY: VSLA Rwanda Elements and Actors

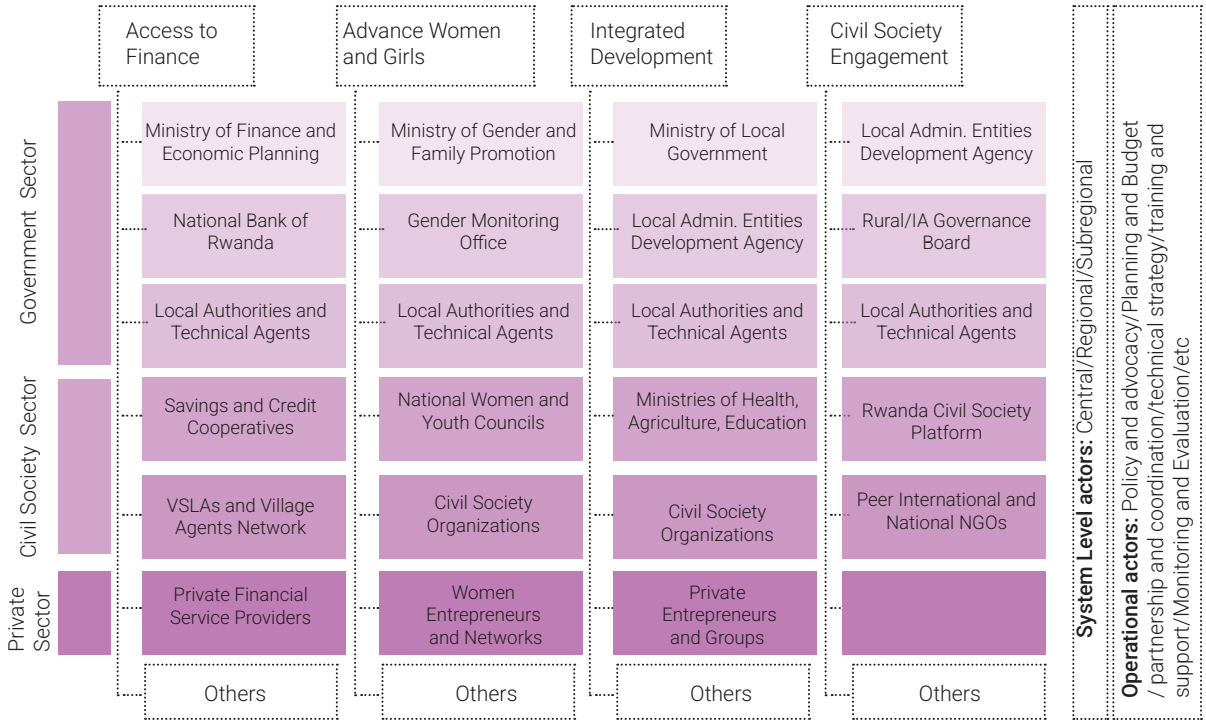


The stakeholders map captured in Figure 12 is a result of the process that CARE Rwanda led with a select group of government, civil society, and private sector partners to identify the key actors who will drive the system integration of VSLA in Rwanda. Specifically, the process entailed a sequence of joint working sessions in which participants used a template (see Reflection Questions 2.5) to agree on an initial list of critical stakeholders, identified across the three sectors, the three administrative levels, and the program's four main technical areas. CARE's VSLA team finalized the list later, following up via phone and email communications with the external consultant, the same participants, and other stakeholders who had been unable to join the group sessions. While it may seem obvious which stakeholders are located centrally, regionally, and sub-regionally, after the process there remained further work for the CARE Rwanda team to validate the institutional structures and actors at the different system levels.

There also remained the task of identifying the many operational actors across the respective technical domains, administrative levels, and institutional sectors. While two days may seem excessive to complete this task, and indeed may be, it is worth noting that assigning tasks is far from a trivial matter. The first discussion will be to clarify the precise tasks and responsibilities that the system must perform to integrate, implement, and scale the intervention. This is not merely about assigning the strategies from Step 6. Rather, the workshop participants will need to consider for each strategy the core operational elements, both the enabling and functional aspects, required for successful system integration and implementation. Then, the workshop participants must agree on how to allocate or share these functions across the three sectors and where each sector will assign these by administrative level, and to specific operational actors, as indicated in the two boxes on the right side of the figure. For programs such as VSLA and FFBS, which traverse several technical domains, this exercise may be repeated several times.

CASE STUDY:VSLA Rwanda Elements and Actors

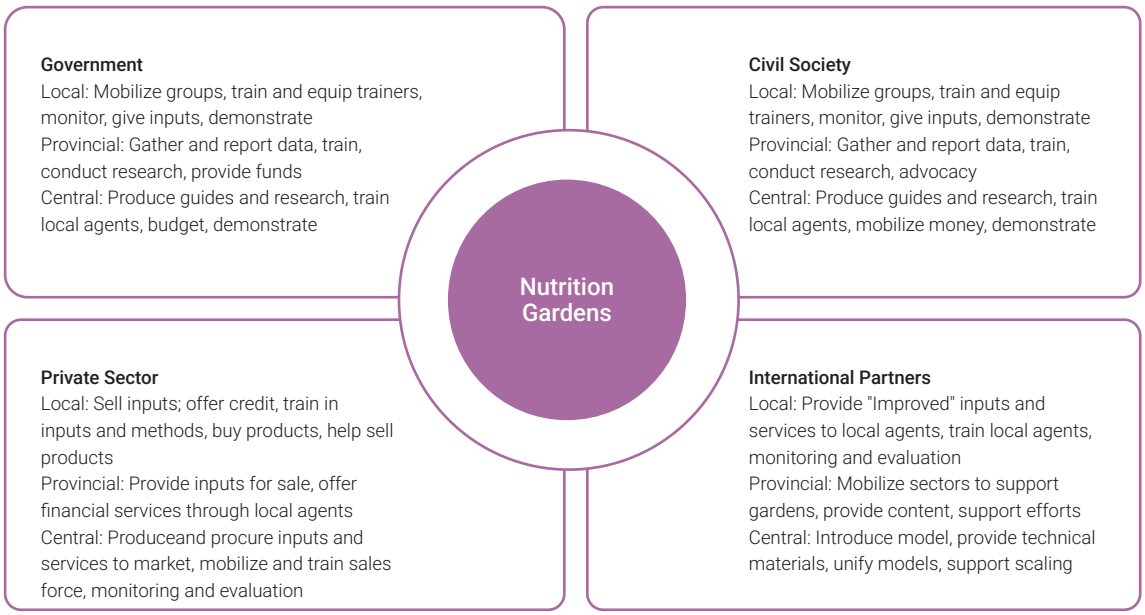
Figure 12: Illustration of a Stakeholder Map: Village Savings and Loan Associations in Rwanda



CASE STUDY: CARE Nepal's Approach to Role Allocation in Nutrition Gardens

CARE Nepal's team allocated specific actions across administrative levels. For the respective institutional sectors. This example pertains just to one relatively minor technical aspect of the overall FFBS intervention: the nutrition gardens. The more fulsome and challenging work of detailing how to assign these responsibilities to specific units or functions within each sector and how to coordinate these will require considerably more effort and, even, negotiation, than is evident in this graphic summary.

Figure 13. Role Distribution Across Institutional Sectors in the Nutrition Garden Intervention (CARE Nepal)





Stage 3: Implementation

This stage focuses on planning how CARE and its partners will enable host institutions to take full ownership—becoming the long-term "doers" and "payers" of the intervention at scale—while CARE transitions into a catalytic support role. A key milestone is identifying and empowering a lead government body to formally assume the Systems Orchestrator role and drive the process forward.

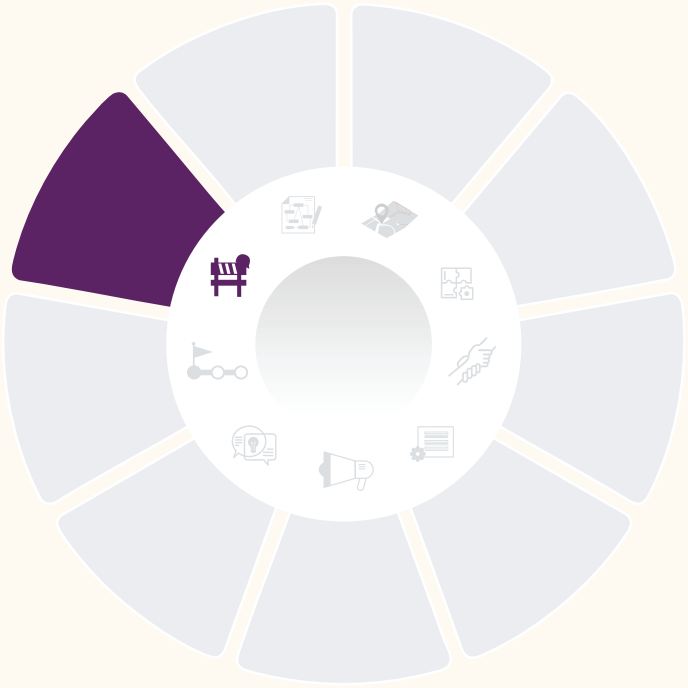
This stage will help you answer

Capacity and Commitment: Build and maintain host institutions' ability to manage, fund, and deliver the intervention over the long term.

CARE's New Role: Define the additional roles, responsibilities, and resources CARE must adopt to support the lead orchestrator as it takes full ownership of the intervention.

Governance and Accountability: Establish formal agreements, steering committees, and other mechanisms to guide and monitor system-led implementation at scale.







Step 8:

Create Your Systems Orchestration Plan



Step 8: Create Your Systems Orchestration Plan

By this point, you've defined the desired outcomes, strategies, and stakeholder roles for scaled, durable integration. Now it's time to convert that foundation into a clear, actionable plan. In Step 8, you and your partners—including the lead government Orchestrator—will outline who does what, when, and with which resources to ensure each institution can manage, fund, and deliver the intervention over the long term. This plan will also specify CARE's evolving role as technical advisor and catalyst, and define the governance and accountability mechanisms needed to guide system-led implementation at scale.

Overview

01 Solidify Your Framework: By now, you have agreed on the intervention's objectives, core strategies, and the stakeholders responsible for each. Step 8 brings these elements together into a single Systems Orchestration plan that will guide implementation, and ongoing evolution at scale, as ownership shifts fully to the host system.

02 Identify the lead Systems Orchestrator: This is the government institution that will formally and visibly assume the Systems Orchestrator role, exercising its official authority to drive the process as system integration is achieved and CARE shifts to a supportive role.

03 Define Actions and Accountability: This plan lays out the sequence of activities, timelines, resources, and governance structures needed to equip both the lead System Orchestrator and CARE Country Office to fulfill their roles. It ensures every institution clearly understands its tasks, commitments, and monitoring mechanisms for durable impact.

Create Your Systems Orchestration Plan Activity: What to Expect

These activities guide you in pulling together all insights, strategies, and stakeholder commitments from Steps 1–7 into a detailed, multi-year orchestration plan. Through a series of consultations and working sessions, you will co-create clear objectives, map roles and responsibilities, establish timelines and budgets, and secure formal endorsements—ensuring every partner is ready to implement and consistently deliver the intervention over time, at scale. Use this one-pager to orient your team on the purpose, structure, and expected outputs of each activity.

DIFFICULTY
Medium

WHAT YOU'LL NEED
Outputs from Stage 2 (outcomes, strategies, roles)

Step 8 worksheets and workshop session

PARTICIPANTS
Core CARE leadership (country director, program manager, monitoring and evaluation lead)

Designated government orchestrator and technical focal points

Key stakeholder representatives (civil society, private sector, community)

Finance officer and workshop facilitator/note-taker

Note: All Step 8 worksheets (8.1 to 8.4) and reflection prompts are included in Appendix for easy reference and print-out.

1. **Workshop Session 8.1: Principal Strategies for a Comprehensive Systems Orchestration Plan (Part 1, 2)**

   Purpose

   To co-create a comprehensive, multi-year Systems Orchestration plan—defining objectives, strategies, roles, timelines, and budget—to guide system integration and scaled implementation. Convene multi-sector workshops to draft each plan element, iteratively refine details, and secure stakeholder endorsements.

2. **Worksheet 8.2: Experience and Expertise Required for Systems Orchestration—Host System Staff Capacity (Part 1, 2)**

   Purpose

   To work with each lead host institution to appraise its staff's ability to assume orchestration responsibilities. Part 1 rates existing capacity; Part 2 uncovers barriers (technical skills, bandwidth) and co-designs steps (training, recruitment, external expertise) to bridge shortfalls.

3. **Worksheet 8.3: Experience and Expertise Required for Systems Orchestration—CARE Staff Capacity (Part 1, 2)**

   Purpose

   To assess CARE Country Office's current experience and expertise against each orchestration function (from "Orchestration Functions" in Step 7). Part 1 rates capacities ("3 = strong" to "0 = none"); Part 2 captures root causes of any gaps and identifies corrective actions (training, hiring, consulting).

Key Considerations

Designing a Systems Orchestration plan begins by revisiting your Design Stage (Stage 2) findings through the lens of real-world system integration and scaled impact. Unlike the controlled "hothouse" environment of a pilot, planning must reflect the local context—its policies, resources, capacities, and constraints. Understanding what's needed to prepare the host system to own, implement, finance, and consistently deliver the intervention over time is the North Star that guides this work. To succeed, CARE should lead a co-creation process that centers the stakeholders who will ultimately own and consistently deliver the intervention over time.

It is important to involve other national and international development partners in the co-creation process. CARE is rarely the sole actor in a sector, and partner models may differ or overlap—potentially providing strengths that can enhance the CARE approach. Open collaboration helps avoid turf battles, prevents ministries from having to choose between competing models, and may uncover complementary strengths. Humility and partnership ensure the orchestration plan reflects best practices from across the ecosystem, offering the best chance of securing broad, lasting support.

It is equally important to recognize that the Systems Orchestration plan introduces new roles and responsibilities for the CARE Country Office. These include providing both technical accompaniment and material support throughout the orchestration process. To manage this effectively, it is important to develop a dedicated sub-plan—complete with its own budget—that outlines the Country Office's orchestration strategies, activities, and actions, and identifies the specific CARE staff and advisors responsible for execution.

Foundational Elements of Systems Orchestration

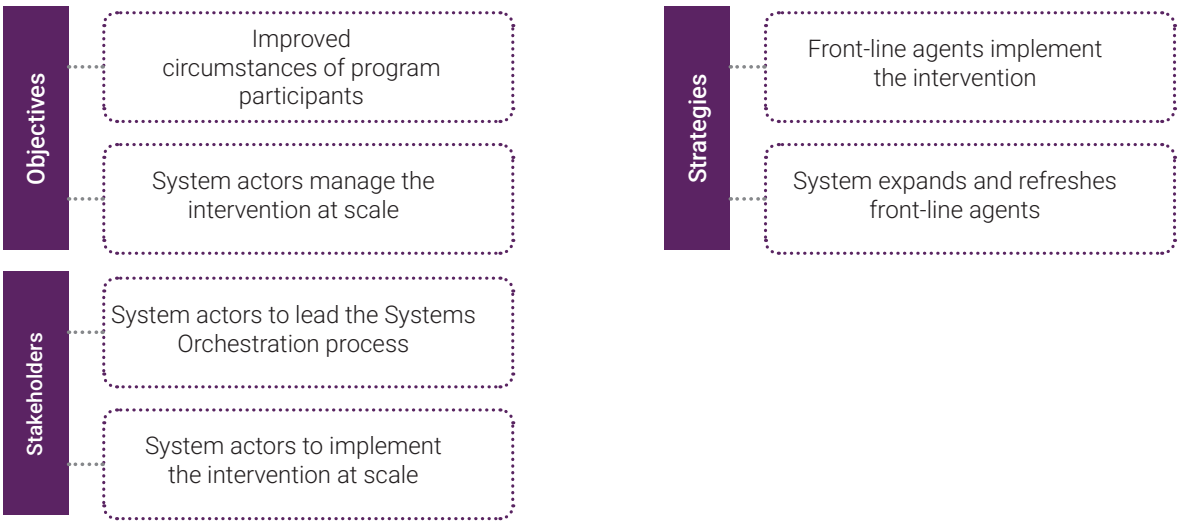
By the end of Step 2, you should have these core inputs needed for developing the Systems Orchestration plan:

Clear Objectives – Detail what the intervention aims to achieve through system integration and scale. They should include end results for participants (e.g., economic, social outcomes) as well as the skills, knowledge, and behaviors participants need to sustain those outcomes. They should also cover development of the host system's ability to manage the operational elements required for long-term success and adaptation.

Defined Strategies – Encompass the training and support front-line implementers need to deliver program components effectively to participants, along with services and products adapted to the local context—not the "hothouse" conditions of the original project. To ensure ongoing relevance, effectiveness, and efficiency, strategies should also include analysis and action research to redesign and refine the intervention in practice.

Identified Key Stakeholders – Outline key actors responsible for managing system integration, long-term implementation, and specific strategies. These stakeholders will span technical domains, operate across government, civil society, private, and international sectors, and function at national, regional, and local levels. There should be clarity and commitment around each stakeholder's specific orchestration roles, for both integration and ongoing operations.

Figure 14. Foundational Elements of Systems Orchestration



Developing the Systems Orchestration Plan

By now you've set your long-term goals, identified strategies, and clarified which stakeholders will own each strategy. Step 8 brings it all together into a practical plan. You'll map out the actions CARE and partners must take—diagnosis, stakeholder commitments, leadership assignment, co-creation, scoping of work, and setup of support structures—to launch and sustain the intervention at scale.

Figure 15: Actions for the Development of a Systems Orchestration Strategy

Action	Description
1. Conduct a diagnostic study	Survey existing interventions, their participants, strategies, and outcomes to spot overlaps, gaps, and best practices to build on.
2. Secure stakeholder commitment	Obtain provisional agreement from government and partners to align behind a common model and process.
3. Appoint a lead orchestrator	Designate the primary government institution (central or local) to steer and own the orchestration effort.
4. Co-create the orchestration plan	Convene all major stakeholders to draft the full Systems Orchestration plan, combining insights, roles, and responsibilities.
5. Define scope of work	Spell out the tasks, timelines, budgets, and resources required—for the lead orchestrator, other responsible institutions, and for CARE's supporting role.
6. Prepare for implementation	Assess each institution's and CARE's readiness; establish governance, coordination, and monitoring systems to support implementation.

1. **Conduct a diagnostic study:**
   - Catalog every intervention—government programs, NGO projects, private-sector pilots—working on the same issues or serving the same participants.
   - For each, record its objectives, target populations (geography, demographics), core technical components (tools, curricula, services), delivery processes (training, outreach, front-line staff qualifications, support), costs, and existing monitoring indicators.
   - Map which institutions (ministries, agencies, CSOs, private firms) drive each element and by what mandate or funding source.

   Why it matters:
   - Reveals where multiple actors overlap (and risk duplication), where "orphans" exist (no one owns a critical function), and where proven practices or tools might be incorporated into your unified model.
   - Helps you present the host system with a menu of vetted options rather than a single "hothouse" design—building buy-in by showing respect for what's already working.

2. **Secure commitment to system integration and a uniform model.**
   - Share the diagnostic findings in a joint meeting with all key stakeholders—ministry decision-makers, donor reps, CSO leads, private-sector partners.
   - Facilitate a discussion to agree on a core set of objectives, technical approaches, and quality standards that everyone will adopt (with agreed areas for local adaptation).
   - These agreements should specify details on things like technical delivery (inputs, documentation, logistics, timing); participants (profile, selection, functions, organization, and support strategies); front-line agents (functions, qualifications, compensation, status, institutional affiliation); monitoring and evaluation (indicators, data collection tools for, analysis process).
   - Capture provisional sign-off—whether via a Memorandum of Understanding, a steering-committee resolution, or even formal minutes—that these actors will support and champion the unified approach.

   Why it matters:
   - Ensures you don't design in a vacuum; stakeholders see their own inputs reflected, reducing resistance and paving the way for resource commitments.

3. **Appointment of a host system institution to lead Systems Orchestration.**
   - Based on authority, sector mandate, and convening power, designate a single government institution (e.g., a ministry's department or a special task force) to act as the official "orchestrator."
   - Clarify their core functions: convening forums, enforcing standards, mobilizing budgets, coordinating across administrative levels, and holding partners accountable.
   - Announce this institution's role publicly—through letters, workshops, and internal circulars—so that all know where the formal locus of authority lies.

   Why it matters:
   - Concentrates responsibility and avoids the "who's in charge?" Confusion that stalls large-scale initiatives.

Figure 16: Illustrative Allocation of Systems Orchestration Responsibilities and Authority Across Administrative Levels

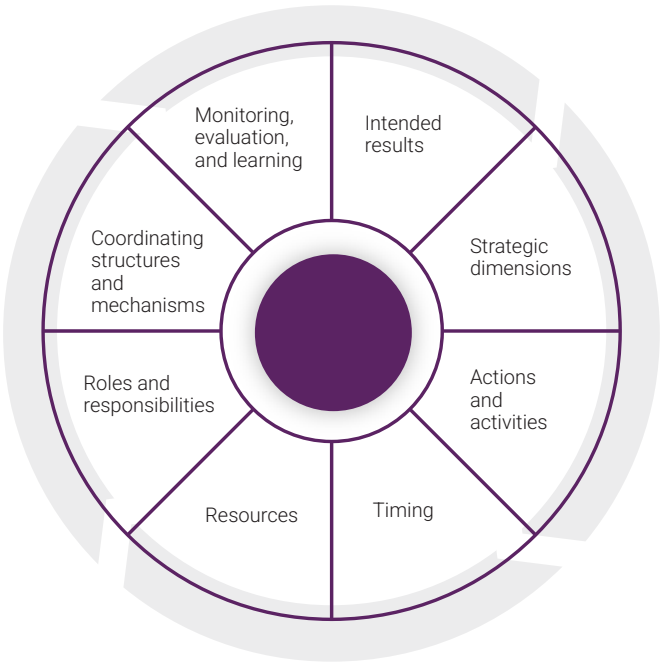
Central Level	Regional Level	Local Level
• Convene key stakeholders • Establish policy and enforcement protocols • Design training programs and certification standards • Mobilize international partners and funding • Consolidate, analyze, and share information • Set quality standards and monitoring and evaluation indicators and procedures • Develop long-term plans • Create budgets and allocate resources.	• Monitor and enforce policy • Conduct certification professional development training • Certify and re-certify agents • Monitor and evaluate implementation and outcomes • Analyze and share data to inform planning and delivery • Mobilize stakeholders and resources • Allocate resources to implementing agents	• Apply policy and provide feedback • Oversee use of resources • Identify training needs and evaluate delivery agents • Oversee and facilitate the coordinated program implementation by all operational stakeholders • Monitor program implementation and impacts • Provide data and review program implementation and impacts to report to regional and central levels

4. **Co-creation of a comprehensive Systems Orchestration plan.**
   - Bring together the orchestrator, CARE, and representatives of each stakeholder group to draft the full Systems Orchestration plan.

   Work through a structured agenda:
   - Objectives and Outcomes: Revisit and refine the program's high-level goals.
   - Strategies and Processes: Translate each outcome into technical ("product") and operational ("process") strategies, noting where fidelity or flexibility is required.
   - Roles and Functions: Assign specific institutions/ actors to each strategy and process, across central, regional, and local levels.
   - Timeline and Resources: Lay out key milestones, session dates, budget lines, staffing needs, and materials.
   - Monitoring and Governance: Agree on steering-committee structures, reporting frequencies, and decision-making protocols. Produce a consolidated draft plan that everyone edits and endorses by session's end.
   - Subsequently, CARE works to develop its internal plan for the actions and investments it will make to ensure that Systems Orchestration plan's ultimate success.

   Why it matters:
   - Harnesses collective expertise, cements ownership and commitment, and builds the consensus you'll need to weather inevitable challenges.
   - Provides clarity the CARE team needs to operationalize and plan for its shifting role.

Figure 17: Elements of a Comprehensive Systems Orchestration Plan



Intended Results

For the Systems Orchestration plan, success is defined not by programmatic outcomes (e.g., increased productivity or financial access for participants), but rather by how fully the intervention's core elements—technical, administrative, and policy—are integrated into and operated by responsible system actors. Therefore, the plan must outline goals, objectives, benchmarks, and targets that reflect the system's capacity to sustain and scale the intervention

Strategic Dimensions

The plan must clearly state which components of the original intervention will be institutionalized, modified, or expanded. These may include broad technical areas (e.g., access to financial services, agriculture, equality for women and girls), specific programs (e.g., savings groups, input access, advocacy), implementation strategies (e.g., training, market facilitation, outreach), and services delivered to participants (e.g., irrigation, insurance, digital platforms).

Actions and Activities

The plan must outline what stakeholders will do to build and sustain system capacity. This includes identifying all relevant actors; designing and delivering training; establishing supervision and support systems; organizing structures for coordination and accountability; developing monitoring, evaluation, and learning systems; adapting technical models; updating official policies and procedures; and mobilizing resources and partners.

Timing

The plan should include a timeline for each action and activity, with estimated durations (days, weeks, months) and level of effort (person-hours or days) for each responsible actor.

Resources

While full resource mobilization occurs post-integration, the plan must detail what will be needed—human, material, logistical, and financial. For each resource, it should specify quantity, timing, location, acquisition method, and responsible parties, ensuring readiness for scaled implementation.

Roles and Responsibilities

The success of the Systems Orchestration plan depends on assigning capable, committed actors to lead its implementation.

These individuals—drawn from across administrative levels and sectors—may serve full- or part- time during the planning phase. While they are not yet responsible for delivering the intervention itself, they are laying the groundwork for its future integration and scale. Some may continue into long-term implementation roles, while others may be engaged solely for orchestration. Assignments should reflect the system's technical and structural complexity and anticipate the transition to host-led leadership as CARE steps back.

Coordinating Structures and Mechanisms

To ensure alignment and accountability, the plan should establish formal coordination bodies—such as steering committees—at central, regional, and local levels. These entities will convene stakeholders regularly (e.g., monthly or quarterly) to share progress, challenges, and plans, fostering collaboration and timely decision-making across sectors and domains.

Monitoring, Evaluation, and Learning (MEL)

The MEL strategy should include two components:

1. Tracking orchestration progress, including stakeholder engagement, role clarity, coordination structures, strategic planning, policy updates, model adaptations, resource identification, and budget approvals.
2. Assessing intervention outcomes post-integration, focusing on training delivery, participant engagement, service provision, participation metrics, and measurable impacts aligned with program goals. Each component should include indicators, tools, protocols, and feedback mechanisms to inform continuous improvement and system-level learning.

5. Define the scope of work for the lead Systems Orchestrator institution, and other lead institutions.

- The lead Systems Orchestrator's responsibilities include: coordinate and convene systems stakeholders, lead reflection for adaptive management, establish and enforce standards, mobilize funding and partners, and oversee monitoring and evaluation.
- The CARE team's role is to support lead institutions in strengthening or establishing needed capacity, promoting relevant knowledge and skills, and ensuring staff have the time and resources to lead effectively. For each partner (including CARE's own country-office team), draft a clear Scope of Work (SoW) that spells out:
  - *i. Responsibilities: These should reflect the commitments made in Step 7*
  - *ii. Deliverables: The tangible outputs (workshops held, tools produced, reports submitted).*
  - *iii. Timeline: Start/end dates for each activity and milestone checks.*
  - *iv. Budget and Resources: Staff days, travel costs, meeting logistics, procurements.*
  - *v. Dependencies: Critical intercoordination needs, approval points, and communication channels. Embed two parallel SoWs: one for the lead orchestrator's formal responsibilities and one for CARE's technical accompaniment and facilitation role.*

Why it matters:

- Removes ambiguity, aligns expectations, and provides the contractual backbone for budgeting and accountability.
- Ensures clarity about the support lead institutions will need from CARE to build their capacity and capability to deliver on the plan.

6. Prepare for implementation of the Systems Orchestration Plan.

- Ensure all stakeholders, including the CARE Country Team, understand their roles and are building the capacity, commitment, and resources needed for system-led implementation, scaling, and ongoing adaptation.
- With key stakeholders, assess each lead institution's and CARE's readiness to fulfill orchestration responsibilities, including its technical and administrative capacity and availability of qualified staff.
  - *i. Identify the implementation functions the system will assume once the intervention is fully integrated and scaled.*
  - *ii. Specify the capacities and capabilities needed to perform these functions, without assigning them yet.*
  - *iii. Allocate functions to stakeholders by technical domain, administrative level, and institutional sector, acknowledging potential overlaps.*
  - *iv. Appraise each institution's readiness to fulfill its assigned functions, focusing on systems, staffing, logistics, and coordination.*
  - *v. Align intervention requirements with current stakeholder capacity, balancing efforts to strengthen institutions with adjustments to the intervention itself.*
  - *vi. Support lead structures and stakeholders in establishing mechanisms—such as steering committees—for regular consultation, coordination, and collaboration.*
- Establish structures to support implementation of the Systems Orchestration plan.
  - *i. Form a multi-level Steering Committee (or equivalent)*
  - *ii. chaired by the lead orchestrator, with seats for CARE, donors, CSOs, private sector, and community representatives.*
  - *iii. Define its ToR: meeting frequency, decision-making rules, reporting templates, conflict-resolution processes.*
  - *iv. Set up a shared digital workspace (e.g., a web-based dashboard) for real-time tracking of progress, risks, and decisions.*
  - *v. Appoint a small Secretariat—staffed jointly by the orchestrator and CARE—to manage logistics, document minutes, and follow up on action items.*

Why it matters:

- Provides the ongoing oversight, coordination, and rapid- response capability that large, distributed programs need to stay on track at scale.

Conducting this Systems Orchestration process will differ in many ways from overseeing a typical funded, time-bound project. Several functions will certainly be similar, but operating the resulting plan will also require both CARE and the system actors to assume new roles, responsibilities, and relationships while both drawing on and cultivating unfamiliar skill sets.

CASE STUDY: Systems Orchestration Plan for FFBS in Nepal



Looking at a Systems Orchestration plan for FFBS in Nepal, the CARE Nepal country team met separately with key system stakeholders at the national, provincial, and local levels to formulate a strategy that focused on the needs, desires, and conditions of the eventual program participants: Producer Group members. This engaged the CARE Nepal team and its partners in addressing four critical questions:

1. What are the outcomes, or benefits, that the system wants the members of the producer groups to achieve?
2. Which actors are responsible at the local level to ensure that the Producer Groups have the knowledge, skills, access, and resources to achieve the desired or expected results?
3. Which structures at the local, provincial, and national levels are responsible for the local actors and what do/must they do to enable and expect them to support the Producer Groups?
4. What strategies will serve best to achieve the expected outcomes given the capacity and motivation of the key actors and the resources their structures provide to them?

An overview of their answers to the questions above is captured in the image below.

Figure 18: FFBS Systems Orchestration Strategy

Putting Producer Group members at the center of Systems Orchestration raises four critical questions:

1. What outcomes and benefits does the system aim to deliver for members of Producer Groups?
2. Which actors at the local level are responsible for ensuring producer groups have the knowledge, skills, practices, and resources needed to achieve the desired outcomes?



3. Which structures at the local, provincial, and national levels are responsible for providing the enabling environment, support, and accountability needed for Producer Groups to succeed?
4. What strategies are most likely to drive the desired outcomes by leveraging the capacities, motivations, and influence of key actors?

The CARE country office should bring key local structures together to answer these four questions. Those structures should then use the answers to shape the national FFBS strategy and begin taking on implementation and monitoring responsibilities.

The development of a comprehensive FFBS Systems Orchestration strategy engaged the team and key system partners in the six steps outlined in the image below.

Figure 19: Preliminary Steps for the Development of a Systems Orchestration Strategy

1. Conduct a diagnostic study of all related interventions
2. Convene key national stakeholders to commit to system integration as a shared goal and to a uniform version of the intervention
3. Identify a lead structure from the host system to guide the Systems Orchestration process and coordinate the stakeholders
4. Identify the local system structures that will be crucial to the intervention's system integration and scaling, specifying their roles
5. Develop a scope of work for the lead structure's guidance of the overall Systems Orchestration process
6. Co-create with key national stakeholders the Systems Orchestration plan, articulating the major strategies and assigning roles

CASE STUDY: Strategic Objectives for VSLA Systems Orchestration in Rwanda



A working session that the CARE Rwanda VSLA team led with a group of key system stakeholders resulted in the following strategic objectives for the Country Office's VSLA Systems Orchestration plan. It is worth noting that the objectives combine aims related both to the success of VSLA as an intervention and those that pertain to the system's implementation of the model. Note that two deeper dives related specifically to Village Agent Networks—a crucial component of VSLA effectiveness—were also elaborated.

A universal version of Savings Groups (SG) helps all Rwandans get access to financial services, operating as permanent, quasi-formal structures in every village nationwide with the support of all sectors

Government	Civil Society	Private Sector

All relevant government, civil society, private sector, and international partners are identified, understand their respective roles and are committed to fulfill these and to coordinate their efforts

Central	Regional	Local

A permanent structure of Village Agents exists and is supported to organize, train, and support VSLAs and to link them to financial services and other development initiatives

Policy	Resources	Staffing

A reliable VSLA management information system operates to collect, analyze, and report information on VSLAs and the overall system to inform continued operation and improvements

1 Conduct a diagnostic study of all SGs programs operating in Rwanda to identify similarities and differences

Coordinate with and support the government-mainly MINECOFIN, the National Bank of Rwanda, and LODA to:

1. Identify all actors operating SG programs in Rwanda, both international and national
2. Analyze the nature of the model each actor is using, considering such details as:
   - The creation, composition, and operation of groups
   - Training and support strategies, frequency, materials
   - The qualifications, training, and functions of agents
   - Group savings and micro-credit practices and results
   - Connection to other development programs; etc.
3. Capture the coverage by the different programs, by region, number of groups, member characteristics, etc.
4. Identify where the different models and coverage are similar
5. Identify where the models and coverage are different, noting both any gaps and any apparent conflicts or

2 Convene key SG stakeholders to commit to the goal of the system integration and sustained implementation at scale of SGs and agree to core minimum standards

Coordinate with and support the government agencies that will lead the program – LODA, MINECOFIN, and NBR? – to mobilize the main SG implementers and funders to:

1. Review the findings of the diagnostic study, focusing on the main commonalities and differences across the models
2. Agree on common standards for the different program elements, concerned mainly by the following elements:
   - The composition, functions, and operation of groups
   - The statutes, functions, qualifications, remuneration, training and support, etc. of Village Agents
   - The design and delivery of training and support to groups
   - Linking SGs to formal financial services
3. For those standards for which a unitary standard is not required, decide on acceptable alternatives
4. Agree on strategies for monitoring and enforcing

3 Identify a lead structure to guide national implementation of the SG program

Consult with main government actors – mainly MINECOFIN, the NBR, and LODA – and other stakeholders – e.g., civil society and funder/implementers – to identify a national structure to lead Rwanda's implementation at scale of the SG model, responsible mainly to:

1. Monitor and enforce adherence to the core program standards by all implementers and funders, upholding the model's integrity in terms of implementation and outcomes
2. Lead the process for reviewing and updating the standards
3. Mobilize new partners – funders and implementers – to support the spread and strengthening of the program
4. Coordinate efforts of different actors, both implementers and funders and working on access to financial services and other areas
5. Gather and disseminate data on SG initiatives and outcomes
6. Gather and generate technical documents for SG training and operation purposes

4 Co-create with relevant stakeholders a comprehensive strategy for the system operation of a national SG program, entailing:

Support the organization of a SG stakeholders' workshop or technical committee to co-create with the lead SG structure a comprehensive strategy for a system-driven national SG program, comprising the following elements:

1. Program goals, objectives, and targets, with a timeline
2. Strategies/steps to create, train, and support SGs
3. Operation of a national Village Agent Network
4. Outline of main SG functions, roles, procedures Monitoring and evaluation of SG activities and outcomes
5. Appraising SG capacity, perhaps with a sort of "maturation scorecard" to qualify Groups for different opportunities
6. Steps to link SGs to formal financial service providers
7. Steps to connect SGs to other development efforts
8. Scopes of work for the different key SG implementing stakeholders, linking to the respective SG program

5 Based on the strategy, develop a scope of work for the national structure that will lead the SG program

With a select group of SG stakeholders – perhaps with the workshop participants or technical committee from #4 – and the designated lead national SG program structure, co-create a scope of work for the lead SG structure, specifying:

1. The key responsibilities, drawing primarily from #3, above
2. The staff members assigned to the structure, articulating the particular role and responsibilities of each
3. The structure's formal (and informal) connections to other structures or partners working with the SG program or connecting with SGs in other ways
4. Responsibilities and strategies for mobilizing funding and other support to operate, sustain, and broaden the SG program
5. Reports, plans, budgets, and other deliverables that the structure is responsible to produce, with deadlines

6 Identify local structures that will be essential to ensure the successful creation, training, support, operation, and outcomes of SGs and develop a scope (or scopes) of work

With a select group of SG stakeholders – perhaps with the workshop participants or technical committee from #4 – and the lead national SG structure, specify the local structures that will support and work with SGs, noting particularly:

1. The roles and responsibilities of local administrators and political actors
2. The roles, responsibilities, and specific activities of village agents, both those assigned and trained directly to work with SGs and those working in other development domains (e.g., health or agriculture)
3. The roles, responsibilities, activities, and services of private sector and civil society actors that serve or otherwise interact with SGs
4. The role of local agents in linking SGs to these different local structures and in supporting positive outcomes

7 Elaborate a strategy, with tools and other resources, for the national operation of an effective Village Agent Network to ensure the creation and successful sustained operation of SGs

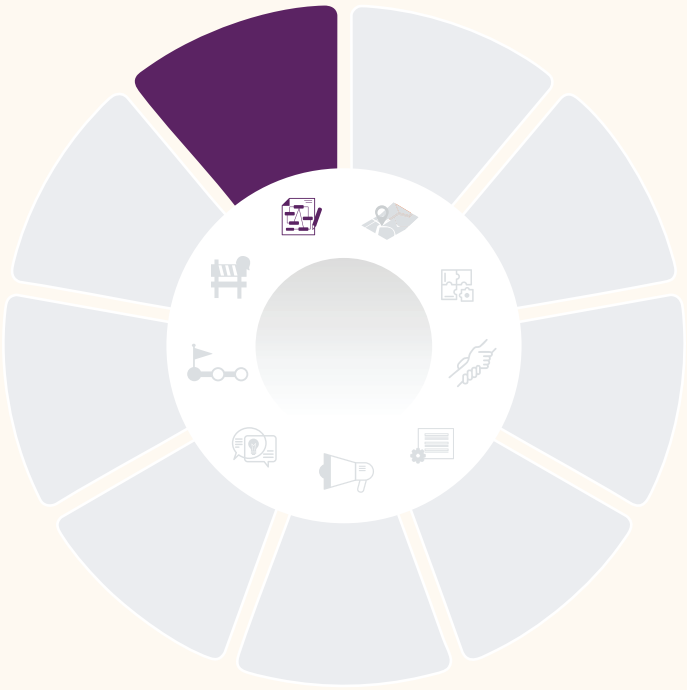
With a select group of SG stakeholders – perhaps the same participants or technical committee from #4 – and the lead national SG structure, co-create a strategy for the operation of a national Village Agent (VA) Network, focusing on:

1. The criteria and processes for creating and maintaining a highly qualified, motivated, and effective cadre of local VAs
2. Establishment of a national VA Network, with national, regional/district, and local structures to coordinate, train, support, and ensure consistent quality among all VAs
3. The compilation and, as necessary, production of technical resources for training and supporting the VAs
4. Articulation and operation of a strategy to provide to VAs financial and other incentives to complete their work (see #9)

8 Identify how critical collaborating structures can support and utilize the Village Agents and SGs for other development efforts

1. Support the lead SG structure and other key SG program and development stakeholders to articulate ways to use the SGs as a platform for broader local development, focusing on:
2. Which local development initiatives address issues of direct interest and relevance to SG members
3. For which local development initiatives SG members are well-suited to play a lead role in terms of advocacy, mobilization, training, technical support, management
4. For which local development initiatives VAs might effectively play a lead role in terms of advocacy, mobilization, training, technical support, management
5. The training and support that SG members might need or desire to be able to participate in and benefit from other development initiatives, and how to provide this
6. The role of the lead national and of local SG structures in connecting SGs to relevant other development initiatives


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AVRIL 2018
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Produit par les femmes du réseau de Tunga-Makoki, dans des parfaites conditions d'hygiène





Step 9:

Implement the Systems Orchestration Plan

Step 9: Implement the Systems Orchestration Plan

The Systems Orchestration effort shifts CARE's role from direct service delivery to helping build an enabling environment and the capacity needed for host institutions to own, fund, and deliver the intervention. Once the Systems Orchestration plan is complete, the previously designated host institution assumes the role of Systems Orchestrator, leading all stakeholders in its implementation. Instead of leading implementation, CARE now becomes a catalyst—guiding adaptations, advocating for resources, and strengthening institutional capacity so the intervention can be sustained and scaled through existing systems.

This shift is likely to be challenging for both CARE Country Offices and for host system actors, all of whom are accustomed to working in traditional ways of donor-funded development projects. Consequently, the shift is likely to require changes in the skill sets and roles of staff both within CARE and within the host system.

Overview

01 Equip and Empower: CARE must work alongside host institutions to ensure they have the clarity, confidence, and capabilities needed to lead the orchestration process. This includes agreeing on roles, coordination structures, accountability mechanisms, monitoring systems, and technical support. CARE's role is to equip internal staff to effectively support these transitions while empowering host institutions to take the lead.

02 Shift Behaviors and Roles: As the host system becomes the Systems Orchestrator, CARE transitions from an implementer to a facilitator. This shift requires all stakeholders—including CARE—to move from passive support to active co-creation. CARE's role evolves to include coaching system actors, brokering relationships, and supporting continuous learning and adaptation.

Note:
Implementing a Systems Orchestration plan may require internal shifts within CARE—new skills, revised job descriptions, staffing adjustments, and dedicated budgets. Step 9 helps CARE Country Offices plan these internal changes to deliver effective, ongoing orchestration support in a system-led model.

Key Considerations

CARE's role during implementation is to ensure that responsible host system stakeholders officially accept and effectively fulfill their roles, thinking strategically about what to do, how to organize, and how to collaborate to sustain the intervention and its impact at scale.

Successfully embedding an intervention into existing systems requires four essentials:

1. Clear Roles and Responsibilities: All host institutions must agree on which parts of the intervention-they will own and deliver, what strategic functions they will perform, and how responsible stakeholders will be supported and held accountable for fulfilling their roles.
2. Capacity and Commitment: Each institution needs the skills, resources, and motivation to carry out its assigned tasks and to allocate adequate funding, staff time, and materials.
3. Coordinating Structures: Effective forums, protocols, or committees must exist (or be created) to enable collaboration and information-sharing across stakeholders, and to engage external partners to support system integration.
4. Ongoing Monitoring and Learning: A system for tracking implementation and outcomes must generate timely evidence to guide continuous improvement and maintain momentum—and to engage external partners both technically and financially.

Implementing the Systems Orchestration plan is itself an ongoing project—it needs its own objectives, activities, budget, timeline, and accountable personnel. Stakeholders require time to learn new approaches, build partnerships, and adjust policies and models to ensure a smooth transition to full system ownership.

Below is a high-level comparison of the lead host institution's and CARE Country Office's roles during Systems Orchestration:

The Lead Host Institution Systems Orchestrator "Payers and Doers"	**The CARE Country Office Team "Catalyst and Coach"**
• Takes full operational ownership—financial, technical, strategic, and administrative—instead of merely approving the intervention. • Directs all partners in their respective roles and holds them accountable. • Leads internal and external advocacy with government and funders. • Mobilizes, motivates, and guides stakeholders to fulfill their agreed functions. • Integrates the intervention's functions and costs into official plans and budgets. • Ensures training systems and support are in place for all implementers. • Monitors implementation and impact, and uses findings to refine technical approaches and scale efforts.	• Prioritizes co-creation over top-down approval. • Strengthens host institutions' capacity—planning, training, supervision, monitoring, and communication. • Supports the lead institution in mobilizing its partners to fulfill their roles. • Advises on adapting the intervention's design and methods for fidelity and flexibility across contexts.

Implement the Systems Orchestration Plan Activity: What to Expect

These activities help CARE Country Offices finalize their orchestration responsibilities by creating an internal support plan. This includes detailing staffing, budget, technical assistance, and operational/logistical elements to deliver on the eight orchestration support functions. This step ensures CARE is institutionally ready to sustain and support a system-led implementation and scale-up. Use this page to orient your team on the purpose, structure, and expected outputs of each activity. Refer to the Appendix for related worksheets and reflection prompts.

DIFFICULTY
Medium

WHAT YOU'LL NEED
Step 8 outputs (staffing estimates, support functions, orchestration timeline)

Step 9 worksheets and workshop templates

PARTICIPANTS
CARE Country Office leadership (country director, program manager, monitoring and evaluation lead)

CARE operations, human resources, and finance leads

Workshop facilitator/note-taker

Note: All Step 9 worksheet and discussion prompts are included in the Appendix for easy reference and print-out.

1. Worksheet 9.1: CARE Support Plan for the Systems Orchestration Strategy

Purpose

To define CARE's internal support strategy for the orchestration process—staffing, budget, technical assistance, monitoring and evaluation—ensuring alignment with the host system's scale and timeline. It also outlines a sub-plan for CARE's internal roles and resources, aligned with the host institution's timeline for scale and durability.

2. Workshop Session 9.2: Staff Audit and Operational Planning

Purpose

To assess which CARE staff are best positioned to take on orchestration support roles based on capacity, time, skills, and interest. The audit guides decisions on reassignment, training, hiring, or consultant engagement. Facilitate internal dialogue on CARE's readiness to deliver orchestration support. This session includes two key activities:

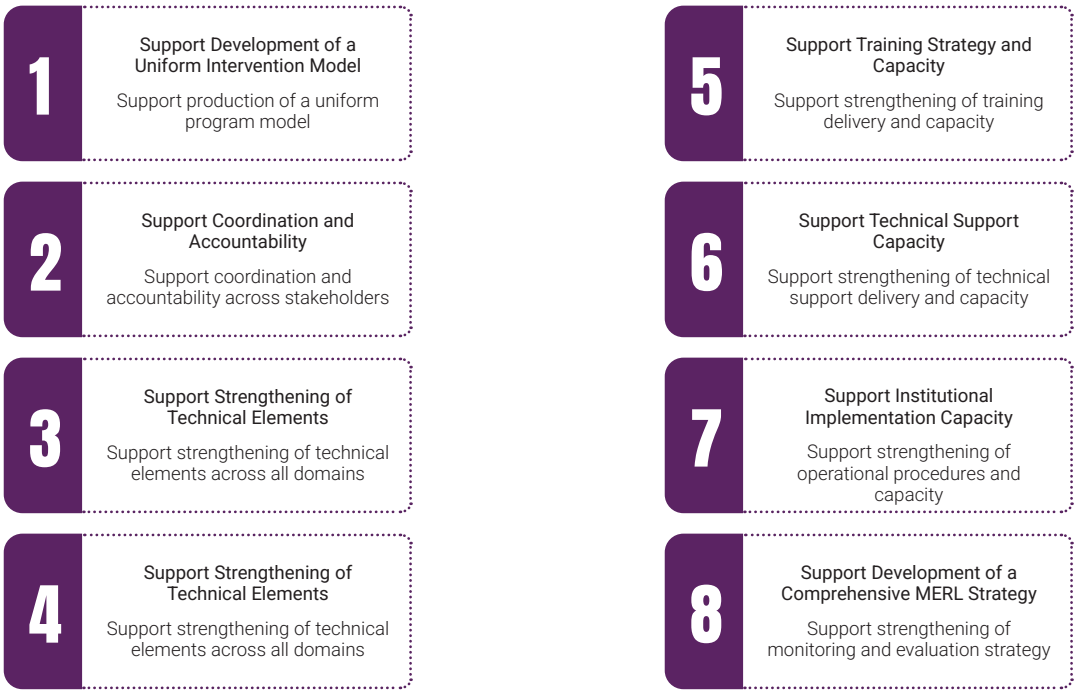
- A **Staff Audit** to evaluate internal capacity and determine who can lead or support each orchestration function
- An **Operational and Logistical Planning** session to map support activities, timelines, responsibilities, and related costs.

CARE Country Office Systems Orchestration Support Functions

For a CARE Country Office, the strategic implications of this shifting role may be profound. Moving from implementer to guide will require CARE Country Office leadership to assess whether internal systems, structures, and staff can deliver on the new supportive, advisory role. The answer to this question will depend on what is needed to help host institutions across domains build the capacity to fully assume responsibility for driving the intervention at scale.

By delivering on the eight functions detailed below, the CARE Country Office can effectively guide and accompany the lead Systems Orchestrator and other host system stakeholders as they implement the Systems Orchestration Plan. Although presented sequentially, these strategies may not follow a strict order. Progress on some may have occurred during earlier implementation, or during the Systems Orchestration process—making repetition unnecessary and allowing for "leapfrogging." The ease or difficulty of advancing any function often depends on partner motivation and capacity, so flexibility matters more than rigid sequencing. Momentum and opportunity should guide decisions, as progress or delays in one area can accelerate or hinder others. Ultimately, this process is as much art as science—requiring judgment and reflection.

Figure 20: CARE Country Office Systems Orchestration Support Functions



1. **Support Development of a Uniform Intervention Model**
   Create a single, system-integrated model by aligning stakeholders and resources. Support the lead Systems Orchestrator in engaging system actors at all levels to secure participation, commitment, and alignment on integration goals and strategy. Re-examine the diagnostic study to identify stakeholder functions and assess capacity to fulfill them. Assist the lead institution in convening stakeholders to formulate unified standards, policies, and guidelines for the intervention, and help draft a comprehensive strategy that incorporates best practices and addresses identified gaps. Establish a CARE Systems Orchestration team to guide host system stakeholders in fulfilling both technical and operational responsibilities for the Systems Orchestration Plan. This includes assessing CO staff capacity and bandwidth, appointing leaders and coordinators, planning staff recruitment or training, mobilizing funding for support activities, and maintaining consultation with CARE technical teams and international partners as needed.

2. **Support Coordination and Accountability**
   Ensure consistent collaboration and transparency across all administrative levels. Help establish or identify steering committees representing all relevant technical sectors to ensure coordination, performance, and accountability across intervention strategies. Develop standardized reporting formats and dashboards for routine progress updates, and produce annual reports summarizing progress, challenges, solutions, and future plans. Facilitate regular and ad hoc stakeholder meetings convened by the lead Systems Orchestrator for coordination and planning. Promote achievements through advocacy and communication efforts to attract funding and partnerships.

3. **Support Strengthening of Technical Elements**
   Improve technical quality through ongoing monitoring, adaptation, and shared learning. Track implementation and results to identify strong practices for standardization and areas needing improvement. Conduct scans of similar interventions to identify adaptable models, embed action research in implementation, and create mechanisms to share learning and evidence. Collaborate with technical experts to strengthen models and methods, and build capacity across actors and systems, identifying areas for external technical support when necessary.

4. **Support Production of High-Quality Technical Resources**
   Provide accessible, validated materials for scaled implementation. Review and harmonize existing resources across stakeholders to identify those best suited for scale-up, and co-develop new quality materials and training modules in print and digital formats. Compile a resource bank of best practices and validated models, and field-test and refine materials as living documents to ensure continued relevance and quality.

5. **Support Training Strategy and Capacity**
   Strengthen system stakeholders' capacity to deliver effective training to participants and frontline agents. Assess existing training systems and strategies, review and update modules and materials, and develop new ones where necessary. Train trainers and technical experts—including frontline agents and academic partners—in intervention content, methods, and materials for both initial and continuous professional development. Support training rollout by developing curricula, advising on delivery, and creating tools for assessment and certification.

6. **Support Technical Support Capacity**
   Equip stakeholders to provide effective supervision and technical assistance. Train technical agents on strategies for high-quality support, and develop comprehensive assistance packages—including guides, documentation, and reporting tools—customized to each technical domain. Facilitate ongoing professional development through in-person and virtual sessions, and establish advisory groups and communities of practice to promote knowledge exchange and strengthen monitoring and evaluation practices.

7. **Support Institutional Implementation Capacity**
   Ensure institutions can integrate and manage intervention operations effectively. Identify technical and operational functions to embed in institutional plans and budgets, designate units and staff for implementation roles, and strengthen their readiness through training, guidelines, and resources. Introduce monitoring systems for performance, enhance internal and external communication channels, and improve feedback loops for performance and adaptation. Reinforce structures to capture lessons learned, improve efficiency, and guide future scaling.

8. **Support Development of a Comprehensive MERL Strategy**

Develop and operationalize a robust Monitoring, Evaluation, Research, and Learning (MERL) framework. Facilitate agreement on universal indicators and strategies for tracking progress and impact, and create digital data collection and reporting tools for all system actors. Build a central platform for data organization, analysis, and visualization, and strengthen capacity in data collection, analysis, and use. Support resource mobilization for MERL activities, promote data-driven improvement and advocacy, and foster a culture of learning and innovation across stakeholders.

Preparing to Support the Systems Orchestration Process

To effectively deliver on each of the eight orchestration support functions, CARE Country Offices should develop a Systems Orchestration Support Strategic Plan. This plan should be grounded in internal reflection and a realistic assessment of available capacity, ensuring that CARE's support is intentional, coordinated, and feasible.

Conducting a Staff Audit

As a first step, CARE Country Office leadership should conduct a staff audit to assess the current capacity, skills, and responsibilities across the team. This process helps identify who is best positioned to take on orchestration support roles—and where additional support, training, or hiring may be needed.

Use the Staff Audit and Operational Planning workshop discussion guide in the Appendix to facilitate this exercise and document your findings.

The prompts consideration of:

- Relevant skills, experience, and time availability
- Reassignment or backfilling of roles
- Training needs and consultant options

Operational and Logistical Planning

Following the audit, offices should map out how they will operationalize their support. This includes identifying key activities, timelines, deliverables, budget, and logistical requirements for delivering orchestration support over time.

Use the Staff Audit and Operational Planning workshop discussion guide in the Appendix to structure this part of your plan. This prompts helps you outline:

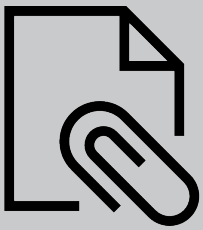
- Staffing and coordination mechanisms
- Monitoring and evaluation plans and technical assistance
- Internal management and reporting
- Resource needs and cost estimates

These planning exercises will strengthen CARE's readiness and ensure internal alignment as orchestration moves forward.

CONCLUSION

The goal of Systems Orchestration is ambitious as it shifts the traditional role of international development organizations like CARE from being the Doer and Payer of projects to accompanying host systems to fulfill these roles. Many global development leaders have called for such a shift, but few concrete steps to make it a reality have happened. By embracing Systems Orchestration, CARE aims to disrupt common development practices. While remaining committed to implementing interventions that contribute to reducing poverty, advancing women and girls, and other development goals, CARE is prioritizing system integration and sustainable scale for its most proven, durable interventions — so they can become the local system's own tools for lasting impact.

Achieving this will require more than new strategic approaches; it will demand a new mindset from both CARE and the host system institutions' leaders. For CARE, these shifts may be challenging for several reasons. First, it means relinquishing some control over the intervention's implementation and outcomes. Second, funders typically expect a level of control and may have little patience for outcomes while a grantee invests in process. Third, host system leaders often expect international partners like CARE to lead the design and implementation of an intervention. Fourth, CARE's staff may also expect to drive the intervention and relationship. Changing the approaches, practices, and mindsets of host system stakeholders may be even more challenging. Leading the system integration and sustainable scale of an intervention requires more effort, resources, and authority than has traditionally been required of them. Challenges can include staff continuity, budgets, and direct competition from similar interventions by other international partners. In development, difficulty is almost never a reason to opt out of a challenge. As CARE Country Offices choose to embark on Systems Orchestration efforts with firmly established interventions, the whole team should take enormous pride in moving towards development that can truly take root, flourish, and endure.



Appendix

Tools & Templates for Action

(Includes worksheets, sample worksheet templates, workshop guides, consultation prompts, and reflection questions)

Step 2: Stakeholder Mapping Activity

Reflection Questions 2.1: Technical Domains

Outcomes of the worksheet: By the end of the Technical Domains reflection questions, your team will have a clear map of the intervention's key thematic areas, tools, and methods; identified who holds authority and responsibility for each element; and laid the foundation for effective stakeholder mapping and system integration.

1. Clarity of Scope: Have we clearly identified the main thematic areas our intervention addresses (e.g., health, education, access to financial services)? Are the strategies, tools, and methods required for delivery well-defined and understood by the team?

2. Ownership and Responsibility: For each technical domain, do we know which institutions or individuals hold authority or decision-making power? Have we identified who is responsible for quality assurance, adaptation, and knowledge management for each domain?

3. Alignment and Integration: Do we see any gaps where a technical domain might lack a clear institutional "home" within the system? Are there overlaps where multiple stakeholders might claim authority over the same technical element? How will we resolve these? Have we identified critical interface points where different sectors (e.g., health + programs for women and girls, education + livelihoods) need to collaborate?

4. Fidelity and Flexibility: Which technical elements must stay consistent to ensure impact (fidelity)? Which elements can and should be adapted to local context (flexibility)?

5. System Readiness: Are local stakeholders ready and equipped to take on the "doing" (implementation) and "paying" (resourcing) roles once direct support phases out? What capacity building, policy shifts, or resource mobilization will be needed to ensure durable progress within each technical domain?

Worksheet 2.2: Identifying Current Partners

Mapping key stakeholders and understanding their roles in the system.

1. Identify Key Actor category: Begin by listing the key actor category involved in the current system. Categorize type of actor, by Public Sector, Private Sector, Civil Society, or Other Actors. *Example Public Sector: May include Parliamentary Committee, Central or Local Government etc. Private Sector: May include Business, Tech, etc. Civil Society: May include NGOs, Community Based Organization, Leaders etc. Other Actors: May include Academia, Media, Donors, International etc.*

2. Stakeholder: Provide name of the stakeholder per actor category you listed above, *e.g., 'Ministry of Finance' and call out any relevant departments/divisions that fall under the umbrella of that stakeholder*

3.

a. Define Roles: For each stakeholder listed, identify their role in relation to the intervention or networked impact effort—Use the categories below to guide your description. *Policy Maker/Regulator, Service Provider, Resource Mobilizer, Participant/End User, Technical Expert, Other.*

b. Analyze Responsibilities: For each stakeholder, provide a detailed explanation of the stakeholder's specific responsibilities, in relation to the identified problem statement or intervention. *What responsibilities does the stakeholder have that are relevant? Describe functions, duties, activities etc. (This part is very important to the engagement strategy to be developed).*

4. Assess Resources and Capabilities: A detailed description of the resources and capabilities available to the stakeholder. *What assets can the stakeholder bring: expertise, networks, funding, brand influence, institutional authority, or other forms of capital? What strengths does the stakeholder have? What support can the stakeholder offer? Does the stakeholder have operational capacity to act, or is it symbolic/representational? Does the stakeholder have funding available relevant to the problem statement or intervention?*

5. Authority: Does the stakeholder have: Decision-making authority–*Set or change policies, laws, or pricing structures?* Resource control–*Control funding, land, infrastructure, or access to markets?* Informational power–*Shape narratives, standards, or have expert authority?*

Worksheet 2.2: Identifying Current Partners

Mapping key stakeholders and understanding their roles in the system.

6.

a. Assess Influence: Rate each stakeholder's influence on the intervention's success on a scale of 1 to 5, where: 1: Low influence (minor role in system) 3: Moderate influence (involved but not central) 5: High influence (critical to system or intervention success).

b. Describe how much influence the stakeholder has over decisions, policies, or public opinion within the system related to the problem statement or intervention. *Does the stakeholder control critical resources, e.g., funding, policy levers, land, access to communities, etc.? Does the stakeholder have the authority to make or shape decisions? Can the stakeholder sway others through its position, reputation, or networks? What is the stakeholder's level of influence over decisions, policies, and/ or public opinion?*

8. Relationships: Analyze the nature and quality of the stakeholder's connections with others in the current system. *Who are key allies, opponents, collaborators, supporter and, networks? How does the stakeholder relate to other stakeholders across sectors? Are there any known tensions, conflicts, or opponents? Are there any known alliances? Consider both formal partnerships e.g., contracts, alliances and informal networks e.g., influence through personal or community ties.*

9. Identify Challenges: Identify and describe the specific difficulties or obstacles the stakeholder faces within the current system, especially related to the problem being addressed. *What unique challenges does this stakeholder experience? What are the top challenges that most affect the stakeholder's ability to engage effectively or achieve its goals? Consider challenges such as operational barriers, limited resources, policy restrictions, difficulties accessing markets, social or cultural issues, or conflicts with other stakeholders etc.*

10. Motivations: Identify what matters most to each stakeholder in relation to the cocoa sector. *What are their core concerns, interests, priorities, and incentives? What do they seek to gain, protect, influence, or avoid through their involvement in the sector? What does this stakeholder care about most within the system sector? What do they stand to gain or lose—economically, socially, environmentally, or politically? What aspects of the sector are they trying to protect (e.g., livelihoods, market access, durability, reputation)? What drives their actions, decisions, or influence in the cocoa value chain (e.g., profit, ethics, compliance, resilience)? How does the success or failure of initiatives in the cocoa sector impact them directly or indirectly?*

11. Engagement Strategy: Based on the understanding of the current system and stakeholders, suggest strategies for engaging these stakeholders to address the problem statement. *What type of engagement would be most effective for each stakeholder group?*

12. Other Comments: *Any additional information that may not fall in the other categories?*

Worksheet Sample 2.2 : Identifying Current Partners

Actor Category	Stakeholder (Name + Dept/ Div)	Role and Responsibilities	Key Relationships	Influence Rating (1-5)	Motivations / Priorities	Key Resources / Strengths	Authority Type	Engagement Strategy	Top Challenges
Public Sector	Ministry of Agriculture – Policy Division	Policy Maker, set policy, fund programs	Collaborates with Finance Ministry; tension with private sector	5	Food security, protect livelihoods	Policy expertise, institutional power	Decision, Resource	MoU, joint planning	Limited budget, bureaucracy
Private Sector	Cocoa Exporters Association	Service providers, export logistics, farmer programs	Works with gov, rivals small traders	4	Profit, market access	Funding, market knowledge	Resource, Info	Public-private dialogue	Market volatility
Civil Society	Local Farmers' Cooperative	Participant / End User, organize farmers, advocate	Ties to community leaders	3	Fair prices, livelihood security	Local trust, social capital	Info (local)	Workshops, capacity building	Low bargaining power
Other Actor	Donor Agency X	Resource Mobilizer, fund and guide programs	Multi-sector partner, funds programs,	5	Durability, impact	Funds, technical expertise	Resource, Info	Co-design, partnership	Shifting priorities

Reflection Questions 2.2: Identifying Current Partners

Outcomes of the worksheet: By the end of this worksheet, you should have a clearer understanding of the stakeholder landscape within the intervention, and insights into the relationships, roles, and influence of each player in the system. This will form the basis for aligning your Systems Orchestration efforts and ensuring all critical stakeholders are on board and engaged.

1. Who are the top 5 allies for the core team? Based on your stakeholder mapping, list the five strongest allies for your core team—those with the highest influence rating whether systemic influence and intervention influence. For each, explain why they qualify as a key ally.

2. What are the best strategies for engaging with the top 5 allies listed above? Using the strategies column, consider what engagement tactics (e.g., meetings, workshops, public forums) might be most effective for each type of stakeholder.

Next Steps:
Update Stakeholder List: Review and expand the list of stakeholders if needed, ensuring all relevant players are included.

Engage Stakeholders: Prioritize outreach to high-influence stakeholders and explore ways to increase engagement with those who have a lower level of involvement but are crucial for the success of the intervention.

Foster Collaboration: Create opportunities for stakeholders to collaborate through workshops, joint decision-making sessions, or regular meetings to ensure alignment and increase buy-in.

Worksheet 2.3: Mapping Strategic Functions to Organizational, Institutional, and Administrative Levels

Objective
To ensure that the strategic functions required for successful Systems Orchestration are effectively mapped to the relevant stakeholders across administrative levels, institutional sectors, and organizational roles.

1. Review the Strategic Functions: Read through the list of strategic functions from the Systems Orchestration Playbook (Policy development, technical leadership, strategic design, monitoring and evaluation, etc.) and become familiar with the roles these functions play in successful intervention delivery.

2. Map Each Strategic Function to the Relevant Level: Using the provided worksheet, match each strategic function with the appropriate administrative level, institutional sector, and organizational role involved in your Systems Orchestration process.
   Organizational Role: The roles and departments within the organization (e.g., technical teams, administrative teams, resource mobilization departments).
   Institutional Sector: Government ministries, NGOs, civil society organizations, and private sector institutions engaged in the intervention.
   Administrative Level: Central, regional, and local government institutions responsible for execution and decision-making.
   Engage Stakeholders: For each mapped strategic function, identify the key stakeholders at the respective levels (central, regional, local) who will be responsible for overseeing or executing tasks related to that function. For example: Policy Development may be led at the central government level (e.g., ministries, parliament). Technical Leadership could involve specialized staff at the institutional level (e.g., NGOs, private sector firms, technical agencies). Monitoring and Evaluation might require coordination across all levels (central, regional, and local).

3. Use the Matrix: Use the matrix in the worksheet to plot the strategic function across different administrative levels. This will help visualize the alignment of critical areas with relevant stakeholders and help ensure that no strategic function is overlooked at any level.

Worksheet Sample 2.3: Mapping Strategic Functions to Organizational, Institutional, and Administrative Levels

Strategic Function	Institutional Sector	Central Level	Regional Level	Local Level	Organizational Role
Policy Development	Public Sector	Ministry of Health	Health District Offices	Local Health Committees	Policy Maker
	Private Sector	Industry Associations	Regional Trade Orgs	Local Business Chambers	Advocate / Influencer
	Civil Society	National NGO Networks	Regional NGOs	Community Groups	Advocate / Influencer
	Other	Donor Agencies	Regional Development Partners	Academia	Technical Advisor
Technical Leadership	Public Sector	National Tech Agency	Regional Tech Teams	Local Experts	Technical Leader
	Private Sector	Private Consulting Firms	Regional Tech Vendors	Local Tech Providers	Service Provider
	Civil Society	NGOs with technical focus	Regional NGOs	Community Tech Champions	Technical Support
	Other	Academic Institutions	Regional Research Orgs	Local Universities	Knowledge Partner
(Repeat this structure for each function)					

Outcome

By the end of this activity, the CARE team will have:

1. Mapped strategic functions to the appropriate administrative levels, institutional sectors, and organizational roles.
2. Identified responsible stakeholders for each strategic area, ensuring no gap in responsibility.
3. Determined resource and capacity needs for each level to successfully manage and implement their assigned strategic functions.
4. Built a collaborative framework for cross-level coordination.

This activity will align the team on key strategic areas and their system integration into the larger Systems Orchestration process, improving the Playbook's usability and ensuring all stakeholders understand their role in sustaining and scaling the intervention.

Worksheet 2.4: Identifying Stakeholder Core Team

This worksheet aims to orient the CARE Country Office team at the very start of the Systems Orchestration planning process as they identify the core group of stakeholders that will contribute to the initial steps. This will feature partners and other system institutions or actors with which CARE has worked or otherwise interacted closely during an intervention's project or program stage. The idea is that this group of stakeholders will be better placed to identify the comprehensive set of stakeholders that will be essential for the intervention's eventual transition from a CARE initiative to a host system-led program, with institutional integration and sustained scale. Specifically, the worksheet guides the CARE country team to consider those partners from the different key institutional sectors with responsibility for an intervention's technical design, alignment with government policies, priorities, and plans, implementation, design, monitoring and evaluation, planning, and funding. The list should include current partners, though it is possible also to include stakeholders with strong interests in and responsibilities for the intervention's key sector (or sectors) and that, therefore, may have unique insights that will be valuable from the start in elaborating the Systems Orchestration plan.

Interventions	Government	Civil Society	Private Sector	International
1. Technical design				
2. Policy, priorities, and plans				
3. Implementation				
4. Design				
5. Monitoring and Evaluation				
6. Planning				
7. Funding				

Step 3: Assessing System Readiness Activity

Worksheet 3.1: Current Practices

The template should be completed separately for each of the intervention's strategic components.

The "Current Practices" worksheet serves to identify the intervention's key strategic elements, concerned specifically by: (i) the main objectives and outcomes; (ii) the principal strategies and actions; (iii) the key actors, specifying both the participants and implementing stakeholders; and (iv) the key measurable indicators. This will serve to guide a preliminary effort to bring a variety of stakeholders together to formulate a consensus around the intervention's purpose and operation, creating a foundation for exploring the four elements more deeply and thoroughly later in the process. The template should be completed separately for each of an intervention's strategic components.

1. Main objectives and outcomes: What are the main results that the intervention seeks to produce and promote for this component? Consider equally the benefits that should accrue to the population receiving the intervention and any changes to the structures and systems

2. Major strategies and actions: What are the main strategies and actions associated with this component that the intervention uses to generate the intended outcomes?

3. Key actors, both intended participants and implementers: Who are the stakeholders that are responsible for implementing this component, concerned equally by those who are involved directly in its implementation and those in more of an oversight or support role, such as government authorities? These stakeholders will likely include CARE personnel and direct partners but may also include government, private sector, and other civil society organizations. It is also useful to situate these stakeholders by their geographic and administrative locations. Ask also, "Who are the groups and individuals that comprise the component's participants, both direct and indirect and by geography?" It may also be useful to identify groups that may be affected negatively by the intervention or who are routinely excluded.
   Implementers:

   Intended participants:

4. Key measurable indicators: What do the intervention's implementers (CARE and partners) and other concerned stakeholders – notably, government officials and funders – identify as the component's key outcomes and what does the intervention measure directly to indicate the degree to which implementation results in these outcomes? These indicators may concern, specifically, the measurable impacts on the participants' lives, measurable changes in the delivery of services or products to the participants, and different measures associated with the intervention's implementation.

Worksheet Sample 3.1: Current Practices

The template should be completed separately for each of the intervention's strategic components.

1. Main objectives and outcomes:
   - By 2024 (government goal) all Rwandans have access to (and usage) of formal and informal financial services.
     1. Increased adult Rwandans financial literacy level, including digital literacy.
     2. Increased access and usage of formal financial services.
   - Improved appropriateness, affordability and diversified formal financial products including digital products available to all Rwandans, and particularly women in rural and other underrepresented areas.

2. Major strategies and actions:
   - Identification of populations who have no or uncertain access to financial services, including savings, credit, and insurance.
   - Organization of collections of individuals from these populations into VSLAs.
   - Readying the members of these groups to have access to and use of formal financial services and facilitation of linkages by VSLAs to formal financial institutions (savings, credit, and insurance); e.g., through financial literacy training, access to digital financial services, etc.
   - Work with formal financial service providers (FSPs) to design and deliver appropriate financial services and products for VSLA members and groups.
   - Government and financial institutions undertake concrete actions and decisions to equip and support members and groups to avail these services and products.

3. Key actors, both intended participants and implementers:
   - Implementers: Government institutions; Faith-based organizations; Formal financial Institutions; Local administration; Local and International NGOs; VSLAs; Village agents.
   - Intended participants: Financially excluded adults, especially women, in all settings; special groups include refugees, youth, and persons with disabilities; current VSLA members and groups.

4. Key measurable indicators:
   - Number of VSLA groups (disaggregated by location) and of VSLA members (disaggregated by sex and other groups, e.g., youth, refugees, disability groups, etc.); Percent of total eligible population that are members of a VSLA.
   - Each category of Rwandans has access to affordable loans, saving, and insurance products from formal institutions.
   - Number of VSLA members that are benefiting from formal financial services and products, by service: savings; credit; insurance.
   - VSLA members have basic knowledge about available financial products and how to access these (Target: all financially excluded members).

Worksheet 3.2: Current Challenges

The template should be completed separately for each of the intervention's strategic components.

The "Current Challenges" worksheet serves to orient the main stakeholders in identifying the various obstacles and difficulties they face in implementing the intervention. As with the "Current Practices" worksheet, it is useful to fill out the template separately for each of an intervention's complementary components. Naming the challenges that a CARE Country Office and partners confront and/or manage with their implementation of the intervention and its components should serve to signal the sorts of challenges that the host system may confront as system integration occurs. The template prompts respondents to consider challenges that participants face as well as those that implementing actor confront or must manage. It also asks respondents to consider challenges that are more programmatic or policy-related and those that are more strategic, linked to the intervention's and each component's operation.

1. Participant engagement: What are the factors that impede or threaten the effective and consistent participation of the intended participants, both individuals and groups, and their achievement of meaningful outcomes? Identify factors that may be attributable to the participants as well as to those structures or actors who are responsible at the interface between the intervention's component and the intended participants.

2. Sector policies, plans, priorities, programs, and leadership: What are the factors that reside at the system level in the form of policies, plans, priorities, programs, common practices, resources, and personnel that do or can undermine or interfere with the effective and consistent operation and achievement of the intervention and its complementary components? Challenges may result due to a factor's quality, its quantity (or number), how it is managed or used, its lack of coherence or compatibility with other factors, and other reasons.

3. Local level leadership, priorities, networks, etc: What are the factors that reside across a system at the local level that may or do impede or weaken an intervention's and its component's effective and consistent implementation and outcomes? Similarly, these may be attributable to a factor's quality, its quantity (or number), how it is managed or used, its lack of coherence or compatibility with other factors, and other reasons.

4. Strategy – the core model and methods, training, support, resources, etc: What about the intervention's and its components' strategic elements are challenging for the respective and collective stakeholders to implement, both separately and in coordination with other elements? Why are these challenging?

Worksheet Sample 3.2: Current Challenges

The template should be completed separately for each of the intervention's strategic components.

1. Participant engagement, both individuals and groups:
   - Limited financial literacy including digital literacy.
   - Limited information around the availability of and access to financial services/facilities
   - Self-exclusion mindset.
   - Long distances to access formal financial services from rural areas.
   - Limited access to credit and insurance that equip families to manage the effects of environmental change.
   - Certain requirements serve as major barriers to people with low incomes' ability to access formal credit services, such as the need for collateral.

2. Sector policies, plans, priorities, programs, and leadership:
   - Conflicting government agendas and programs and limited coordination created confusion among VSLAs/ saving groups concerning how to gain access and benefit from financial services and products; need to sequence and align different actors' services and products and provide proper sensitization, training, and support.
   - Formal FSPs do not invest in non-financial services, doing little to sensitize, train, and support people with low incomes and other underrepresented groups to use formal savings, credit, and insurance.
   - Limited resources–financial or human–assigned to accompany and mentor VSLAs through the phases of maturity.

3. Local level leadership, priorities, networks, etc:
   - Conflicting local government agendas and programs pressure VSLAs to reconcile their established financial goals with those of government.
   - Different approaches by other savings group practitioners/NGOs to implement the model, with these often in strategic opposition.
   - Overlap of different civil society stakeholders on same clients/participants, with limited coordination.

4. Strategy – the core model and methods, training, support, resources, etc:
   - Conflicting government agenda and programs, as above.
   - Different approaches by different technical partners—NGOs—to implement the model.
   - Overlap of different intervenor on same clients/participants.
   - Financial service providers see VSLAs as a risky area because they do not see the potential of the VSLAs and worry about the ability of these informal savings and credit entities to provide collateral.
   - Limited credibility of VSLAs by service providers due to low recognition and categorization and maturation guidelines; i.e., VSLAs are only recognized at the cell administrative level.

Worksheet 3.3: Key Assets and Advantages

The "Key Assets and Advantages" worksheet looks at the same factors that stakeholders will analyze from the "Current Challenges" worksheet but considers these from a positive angle. Here, the participants will identify what aspects related to the intervention's and component's participants, system-wide elements, local capacity and capabilities, and the strategic dimensions favor or promote effective and consistent implementation and the attainment of desired outcomes.

1. Participant engagement: What helps the people the intervention is meant to reach, both individuals and groups, take part effectively and consistently and achieve meaningful outcomes? Include factors related to these people themselves and to the structures or actors who deliver the component to them..

2. Sector policies, plans, priorities, programs, and leadership: What are the factors that reside at the system level in the form of policies, plans, priorities, programs, common practices, resources, and personnel that do or can promote or favor the effective and consistent operation and achievement of the intervention and its complementary components? Assets and advantages may be attributable to a factor's quality, its quantity (or number), how it is managed or used, its lack of coherence or compatibility with other factors, and other reasons.

3. Local level leadership, priorities, networks, etc: What are the factors that reside across a system at the local level that may or do favor or promote an intervention's and its component's effective and consistent implementation and outcomes? Similarly, these may be attributable to a factor's quality, its quantity (or number), how it is managed or used, its lack of coherence or compatibility with other factors, and other reasons.

4. Strategy – the core model and methods, training, support, resources, etc: What about the intervention's and its components' strategic elements are favorable to or supportive of the respective and collective stakeholders to implement, both separately and in coordination with other elements? Why are these positive?

Worksheet Sample 3.3: Key Assets and Advantages

1. Participant engagement, both individuals and groups:
   - Enabling environment – government leadership (MinFin, central bank, LODA) recognition of VSLA as a strong platform, coordination of actors, favorable policies and strategies, dedicated financial resources (limited), wealth of actors operating in the space, etc.,which is supportive to VSLA movements.
   - Regular meetings/interactions by VSLA members promote social cohesion and mutual trust.
   - Availability of local support and services (Business development services).
   - Availability of FSPs providing financial and non-financial services to existing VSLAs.
   - Income generating activities (IGAs) and access to markets.
   - Experience with partner MFIs that accept social collateral instead of physical collateral to approved award of loans.
   - Current practice and strategies for linking VSLAs to local FSPs.
   - Formal structures that represent youth, women and people with disabilities presently exist.

2. Sector policies, plans, priorities, programs, and leadership:
   - Policies, legal frameworks, and national priorities that reach everyone (adult literacy, financial literacy, national social protection policy and strategy, etc).
   - District development plans that prioritize access to financial services.

3. Local level leadership, priorities, networks, etc:
   - Participation of citizens in performance contracts (Imihigo);
   - Joint Action Development forum;
   - Existence of financial services (Umurenge SACCOs) Vision Umurenge Program financial services under the social protection program.
   - Mobile network operators (MNOs).

4. Strategy – the core model and methods, training, support, resources, etc:
   - National strategy for increased access to financial services, especially by women and other underrepresented groups.
   - Programming of different development initiatives by many different actors uses VSLA as and entry point.
   - Farmer field and business schools link to VSLAs.
   - Working with FSPs to develop and deliver financial products and services designed for women's needs, including digital.
   - Promoting collective IGAs to be implemented by VSLA members.
   - Strong support services available with many FSPs (but access by rural women and others is uneven).
   - Peer learning and exchanges exist and operate through the VSLAs and with the assistance of the village agents.
   - Coaching and mentor-ship is provided by village agents and experienced local entrepreneurs.
   - Village Agent Network (VAN) exists and is operating, supported by CARE and other partners.

Step 4: Phase Planning
Mindset Activity

Worksheet 4.1: Articulating a Vision of the Intervention's System-Led Implementation at Scale

The questions in the following template aim to provide the intervention's key stakeholders an initial opportunity to envision the scope, impacts, and implementation of the intervention and its strategic components at scale and once system integration has occurred.

1. **What do participants in the intervention or a specific component do?** Here, stakeholders should describe the activities people take part in through the intervention or component (for example, saving together in a VSLA or attending field school sessions)

2. **How do participants benefit from engagement in the intervention or component?** Here, stakeholders focus on what their access, participation, or other engagement with the intervention or component equips or permits them to do that brings them the intended benefit. In other words, what can they do now that they couldn't do prior to the intervention? Consider for direct benefits or outcomes and indirect ones.

   Direct benefits
   Indirect benefits

3. **How does the intervention or component reach new areas and groups, and how does it take root and expand once there?** Here, stakeholders will consider both what must happen for the overall intervention and its strategic components to expand its coverage system wide and identify the host system structures and actors who will manage and sustain this shift. Among the actions and decisions to consider are policy, planning, source(s) of funding, budgeting, training, supervision and support, coordination of efforts, and monitoring, evaluation, and evidence-informed adjustments. It may also be useful to review the intervention's and component's current operation (consulting the results from the earlier worksheets) to set a benchmark and higher standards for the system-led version.

   Present
   After System Integration (What is different?)

4. **What does a fully mature operating model for the intervention look like at the point of delivery or interface with participants?** Here, stakeholders describe what front-line workers will do to reach, serve, and support the people the intervention serves. This includes strategic elements, local management, communication, financial considerations, and other dimensions that will support the sustained, high-quality operation and consistent effectiveness of on-the-ground operation.

5. **How do intended participants access, engage and benefit from the intervention and its components over time?** This question asks stakeholders to describe how people interact with the intervention and its components. How do they learn about it? What do they need to qualify, and what steps must they take? What does long-term participation look like, and how do they stay involved? What other programs or services can they connect with, including ones that could replace the intervention or take them a step further?

Worksheet Sample 4.1: Articulating a Vision of the Intervention's System-Led Implementation at Scale (Part 1)

1. What do the members of a successful VSLA do?
   - They use digital means to get access to financial services, to their transactions and accounts, and to relevant information, financial and other.
   - Operate common/shared income-generating activities.
   - Save, borrow, and invest informally and formally.
   - Linked as a group and individually to formal financial service providers–saving, credit, insurance, pension, etc., selecting providers following careful analysis and engaging with discipline and respecting requirements.
   - Conduct proper, transparent book-keeping.
   - Members have access to properties–use and ownership.
   - Advocate for policy change and access.
   - Members are assuming local leadership positions and participating actively in local community development initiatives.
   - VSLA is officially registered (at the cell level, for now).
   - VSLA group is connected to a larger VSLA network.
   - Interacts with different community development sectors and actors, including from government, civil society, and private domains–serving as an "entry point" or "platform" for broader integrated development.
   - Strong mutual support among VSLA members–social, personal, economic, health.
   - Members are saving in the formal government pension scheme.
   - Maintaining membership through retention and recruitment (aiming for at least 80%).
   - They appoint and rotate a VSLA leadership–president, treasurer, secretary, etc.
   - Meet weekly to deliver their shares and discuss topics.
   - At least 80% of loans are invested in IGAs.
   - Loan uptake rate should be at least 70% of members' taking loans, whether from VSLA or an FSP.
   - Receive training on a wide range of financial and other development sectors, such as equal rights for women and girls, nutrition, business development, etc.Engage in advocacy with policy-and decision-makers at all levels on topics linked to their needs, interests, and well-being.
   - Some are evolving to cooperative status.
2. Sector policies, plans, priorities, programs, and leadership: Directly? Indirectly?
   - Women's rights, security, empowerment, ownership and control of resources, participation in household and community decisions, etc, are elevated with decreased incidence and rates of violence against women and girls.
   - VSLA members' families benefit from improved health, nutrition, education, and other aspects of personal and family well-being.
   - Increased social capital–solidarity, group cohesion, mutual aid, and support.
   - On a resilient path to graduate out of poverty, including improved resilience to shocks (economic, climate related, health).
   - Increased access to and profiting from a variety of economic, social, and other services and resources that meet their needs" to the end of the sentence.
   - Effective participation in value chain ecosystems.

Worksheet Sample 4.1: Articulating a Vision of the Intervention's System-Led Implementation at Scale (Part 2)

3. How do new VSLAs appear? How do they grow and thrive? (Who is responsible and how do they facilitate the process?)

   Now

   - When there is a new funding opportunity for CARE.
   - Local NGO partners, trained and supported technically by CARE, recruit and train village agents who mobilize, train, and support the official creation and registration of new groups.
   - Consult FinScope (by Min of Fin) report to identify areas of high financial exclusion, prioritizing districts from this list
   - Work with district authorities to identify priority sectors and cells in which to create new VSLAs.
   - Conduct village meetings to announce the VSLA program and to recruit members.
   - Organic creation of VSLA, with new groups attracted to what they see with existing VSLAs and supported by existing VSLAs and Village Agents.

   After System Integration (what is different?)

   Funding comes from?

   - VSLAs mobilize resources from members and activities to pay for training and assistance from VA–Will this work for creating a new group or will it be more appropriate for groups once they are constituted and operating?
   - Government creates a "New VSLA fund" for the creation of new VSLAs, drawing on its own re-sources and on funds from partners; e.g., FSP, Ministries of Finance, Gender, Industry and Trade, and Health, along with Local Government, Agro-business and other private sector actors involved in the value chain.
   - An annual (graduated) fee paid by existing VSLAs or some other financial contribution from these, international partners, Development partners could support VSLAs through service implementation of projects VANs receive payment (from?–see other bullets) for creating new VSLAs.
   - Leverage investments/funding for creating new and supporting existing VSLAs from specific stakeholders, notably from the international development partners and Rwandan investors linked to their specific programs or projects for which VSLAs will serve as entry points or platforms or program.
   - Some system structure (Min? VAN? CBR?) recruits and trains Village Agents (and/or others, such as Para-Social Workers?) who mobilize, train, and support the official creation and registration of new groups as formally approved service providers.
     - **Question:** Will these agents be government employees, civil society employees, operate as an independent social enterprise or NGO, or some other way, operating under the official or in-formal authority of some government structure
     - **Question:** How harmonize or align the Village Agent role with the Para-Social Worker role? Do you combine them entirely.

Worksheet Sample 4.1: Articulating a Vision of the Intervention's System-Led Implementation at Scale (Part 3)

- All development players investing in financial sector development activities will consult Fin-Scope (by Ministry of Finance) report to identify geographic areas of high financial exclusion, prioritizing districts from this list.
- Development, government, private sector, and civil society actors investing in sectors other than financial services identify the need for new VSLAs in the zones of their intervention to in-corporate these into their new initiatives.
- District, sector, and cell authorities identify priority villages in which to create new VSLAs and take initiative to do so.
- Conduct village meetings to announce the VSLA program and to recruit members.
- Encourage organic creation of VSLA, with new groups attracted to what they see with existing VSLAs and supported by existing VSLAs and Village Agents.

4. What is a mature VSLA, or maturation process?
   - Number of share out cycles
   - Growing size of shares
   - Number, size, and productivity/profit of income-generating activities
   - Group borrowing from FSP and availing other services–savings, insurance–grows in number and size
   - Members are taking advantage of FSP products increasingly and in increasing sizes
   - Members are assuming other leadership roles in the community
   - A VSLA spawns and/or supports the creation of new VSLAs
   - Use of digital financial services and tools
   - Number of years of operation
   - Capacity growth of members
   - Greater compliance with VSLA methodology
   - Lower frequency of support requested from VA
   - Lower dropout rate of VSLA members
   - Organizing training and support from other development sector actors to support their initiatives
   - Engaging in advocacy initiatives and Improved repayment rates etc.

Worksheet Sample 4.1: Articulating a Vision of the Intervention's System-Led Implementation at Scale (Part 4)

5. How do VSLAs have access to and benefit from formal financial savings and credit programs and institutions and to other development sector programs and initiatives? Which structures are key to this?

   Access

   - See maturation

   Structures

   - FSPs interacting directly to "market" and "sell" their products–savings, credit, insurance, pension–to groups and members.
   - Ministry of Finance and National Bank of Rwanda for financial literacy, digital financial literacy, financial literacy.
   - Development ministries such as Gender, Local Development, Agriculture, Industry and Commerce, Health, etc., to use VSLAs as an entry point, platform, or "client" for their initiatives.
   - Private sector, such as agribusiness, FSPs, telecom operators, other value-chain actors, business and industry chambers and associations, etc., seeking clients and/or producers through the VSLAs.
   - Civil society, including local and international NGOs, women's rights organizations, women-led organizations, etc., seeking to operate with and through VSLAs as an entry point and platforms for operation.
   - Development partners, such as bi-laterals, multi laterals, embassies.

   How do all of these reach to VSLAs to implement efforts linked to their investments, programs, projects.

6. What is the profile of a fully mature VSLA and how does it keep operating over the long term?
   - See above.

Worksheet 4.2: Core team-Systems Orchestration Roles and Responsibilities

This worksheet aims to guide the core group of intervention partners, those named in the "Identifying Stakeholder Core Team" worksheet, to specify the essential roles and responsibilities that the host system's institutional sector must fulfill for effective system integration and sustained scaling to occur. It asks the partners to list for each sector (i) the mandate that drives or motivates its participation in the intervention, (ii) the authority it has over the intervention's operation and associated stakeholders, (iii) the main roles it plays in the intervention's operation and scaling, and (iv) its associated purpose, or the results to which it hopes to contribute.

Sector	Mandate	Authority	Roles	Purpose
Government				
Civil Society				
Private				
International				

Worksheet Sample 4.2: Core team-Systems Orchestration Roles and Responsibilities

Sector	Mandate	Authority	Roles	Purpose
Government	• Set policy and priorities	• Monitor, support, and enforce policy • Plan and fund activities	• Leadership • Implementation • Mobilization	• Alleviate poverty • Mobilize civic engagement • General wellbeing
Civil Society	• Support/facilitate innovation and implementation	• Implement in accordance with policies and priorities	• Implementation • Mobilization	• Same as government • Relevance and viability
Private	• Provide goods and services • Promote profit	• Create markets • Operate as market actors	• Value-chain operators • Service providers	• Profit • Market growth • Market share
International	• Support country's development priorities and plans • Provide financial and technical assistance	• Implementation of projects it funds • Implementation by any grantees • Coordination with government	• Program implementation • Technical support • Coordination with other stakeholders • Evidence generation	• Alleviate poverty • Institutional and technical capacity-strengthening • Introduce and validate innovation

Worksheet 4.3: Identifying Host System Institutions That Will Be Integral to an Intervention's System Integration and Sustained Scaling (Part 1)

This worksheet guides stakeholders to identify for each of an intervention's component the key stakeholders who are responsible for or intimately affected by the seven respective operational elements that are critical to the intervention's (and components') effective system integration and scaled implementation. The core group of stakeholders – those identified in the "Identifying Stakeholder Core Team" worksheet – should identify these for each of the three main levels of the national system, distinguishing between what happens presently and how this will look once system integration has occurred. Stakeholders include three groups: the people who make decisions about the component, the people who carry out those decisions, and the people the component serves or could harm. Stakeholders also include not just government officials and agents but also actors from civil society and the private sector in addition to local community leaders and residents, such as any groups organized under an intervention or a component – e.g., VSLA members or FFBS producer groups.

a. Policies and Strategies

Sector	Central Level	Regional Level	Local Level
Government	Presently	Presently.	Presently. . . . .
	Post-System Integration.	Post-System Integration	Post-System Integration. . . . .
Civil Society	Presently	Presently	Presently . . . . .
	Post-System Integration.	Post-System Integration	Post-System Integration . . . . .
Private Sectors	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration.	Post-System Integration. . . . .
External Partners	Presently	Presently	Presently . . . . .
	Post-System Integration.	Post-System Integration	Post-System Integration. . . . .

Worksheet 4.3: Identifying Host System Institutions That Will Be Integral to an Intervention's System Integration and Sustained Scaling (Part 2)

b. Technical Approaches

Sector	Central Level	Regional Level	Local Level
Government	Presently	Presently.	Presently. . . . .
	Post-System Integration.	Post-System Integration	Post-System Integration. . . . .
Civil Society	Presently	Presently	Presently . . . . .
	Post-System Integration.	Post-System Integration	Post-System Integration. . . . .
Private Sectors	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration.	Post-System Integration. . . . .
External Partners	Presently	Presently	Presently . . . . .
	Post-System Integration.	Post-System Integration	Post-System Integration. . . . .

c. Implementation / Management

Sector	Central Level	Regional Level	Local Level
Government	Presently	Presently.	Presently. . . . .
	Post-System Integration.	Post-System Integration	Post-System Integration
Civil Society	Presently	Presently	Presently . . . . .
	Post-System Integration.	Post-System Integration	Post-System Integration . . . . .
Private Sectors	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration.	Post-System Integration. . . . .
External Partners	Presently	Presently	Presently . . . . .
	Post-System Integration.	Post-System Integration	Post-System Integration

Worksheet 4.3: Identifying Host System Institutions That Will Be Integral to an Intervention's System Integration and Sustained Scaling (Part 3)

d. Training and Support

Sector	Central Level	Regional Level	Local Level
Government	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .
Civil Society	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .
Private Sectors	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .
External Partners	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .

e. Monitoring and Evaluation

Sector	Central Level	Regional Level	Local Level
Government	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .
Civil Society	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .
Private Sectors	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .
External Partners	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .

Worksheet 4.3: Identifying Host System Institutions That Will Be Integral to an Intervention's System Integration and Sustained Scaling (Part 4)

f. Coordination

Sector	Central Level	Regional Level	Local Level
Government	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .
Civil Society	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .
Private Sectors	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .
External Partners	Presently	Presently	Presently . . . . .
	Post-System Integration	Post-System Integration	Post-System Integration . . . . .

Step 5: Define Program Purpose and Core Outcomes Activity

Consultation Session 5.1: With Front-Line Stakeholders

CARE Country Offices should lead two key activities to build consensus on core outcomes and indicators:

Part 1- Consultations with front-line stakeholders

This consultation engages front-line stakeholders to capture their motivations, challenges, and needs, ensuring our integration plan aligns with real-world conditions. Below are the key elements to guide effective planning and gather meaningful insights.

- ***Purpose:*** *Discover what motivates participants, technical program staff, and front-line workers to engage with the intervention, and what support they need to stay engaged as it scales.*
- ***Participants*** *: Engage current and potential participants, field agents and implementers, and local administrative, technical, and traditional leaders.*
- ***Logistics:*** *Draft focus-group or interview guides (and optional surveys), arrange site visits to representative locations, and summarize findings for sharing.*
- ***Timing:*** *Conduct 60–90 minute sessions early in the Preparation phase, keeping surveys light unless rigorous data are required for advocacy.*
- ***Results / Deliverables:*** *Produce a validated list of core and ancillary outcomes prioritized by front-line actors, along with insights into their motivations, barriers, and local context.*

Below are concise questions to guide your discussions with front-line stakeholders. Use these prompts to uncover what participants value most, how the intervention affects their lives, and what's needed to maintain benefits over time.

1. What have you gained from this program (e.g., skills, tools, services)?
2. How has it improved your personal well-being (e.g., health, education, nutrition)?
3. How has it benefited your family, and what do successful participants do differently?
4. What other opportunities has the program opened up for you beyond its core activities?
5. What motivates people to join this program?
6. What additional support or outcomes would you like from the program?
7. What needs to be in place so you (and your group) can keep benefiting once formal support ends?

Workshop Session 5.2: System Integration Scoping

Part 2- System Integration Scoping Workshops

Below are the core elements to guide your System Integration Scoping Workshops. Each section outlines essential considerations to ensure these sessions are focused, productive, and aligned with our scale-up objectives.

- ***Purpose:*** *Share front-line insights with senior and sector stakeholders and confirm the specific outcomes each institution must deliver for successful integration and scaled impact.*
- ***Participants****: Engage ministry officials (national, regional, local), leaders from other relevant ministries and partner organizations, and civil-society and private-sector representatives poised to support scale.*
- ***Logistics:*** *Book the venue and arrange materials (stationery, AV, refreshments), distribute a concise briefing of front-line findings in advance, and facilitate breakout and plenary sessions to document agreed outcomes.*
- ***Timing:*** *Hold this 2–4 hour workshop mid-Preparation (after front-line consultations), ensuring outcome discussions remain under two hours for maximum clarity.*
- ***Results / Deliverables:*** *Secure partner commitments to a core set of participant outcomes, produce a clear list of institutional responsibilities and required outcomes, and agree on next steps with a timeline for embedding the intervention into system structures.*

Below are concise, partner-focused questions to guide your discussions with program partners and other institutional actors. Use these prompts to clarify how the intervention aligns with their goals, what they need for sustained engagement, and how to measure and resource success at scale.

1. How does this intervention advance your institution's goals now—and what outcomes will you expect once it's fully integrated and scaled?
2. What additional outcomes would justify your organization's continued involvement?
3. Which current outcomes might be hard to sustain at scale, and how could we address those gaps?
4. Which specific indicators will show progress toward core outcomes, and how can we measure them reliably?
5. What participant numbers (disaggregated by sex, age, location, etc.) does your institution need over the long term?
6. How does your organization define "quality" in achieving these outcomes?
7. Which outcomes best reflect the scope and quality of implementation from an institutional perspective, and how should we monitor and report on them?
8. What cost adjustments are necessary to align the program with available system resources?

Worksheet 5.3: Elaborating a Program's Core Outcomes and Indicators

Instructions

Use this worksheet in your System Integration Scoping Workshop to capture and refine your program's core outcomes, then specify how you'll measure and track each one.

1. **Outcomes:** Brainstorm/Define the specific participant benefits and system-level change you aim to achieve.

    a. **Indicator:** Select a measurable metric that directly reflects progress toward the outcome.

    b. **Baseline:** Record the current value of the indicator before Systems Orchestration begins.

    c. **Target:** Specify the desired value by the end of the orchestration period.

    d. **Data Source:** Identify where and how indicator data will be collected.

    e. **Frequency:** Determine how often you will measure and report on the indicator.

Worksheet Sample 5.3: Elaborating a Program's Core Outcomes and Indicators

Outcome	Indicator	Baseline	Target	Data Source	Frequency
1. **Increased access to formal financial services**	• Percent of the target population with at least one formal account			Household survey: financial provider records	Quarterly
2. **Improved financial literacy among participants**	• Percent of participants scoring 2 80% on the financial literacy test			Pre/post-training assessments	After each training cycle
3. **Strengthened institutional capacity for intervention delivery**	• Number of host-institution staff trained on core protocols			Training attendance records	Annually
4. **Clear policy support for scaled implementation**	• Number of relevant policies/guidelines officially adopted			Government gazette; ministry reports	As policies change
5. **Sustained partnership and resource mobilization**	• Amount of co-funding secured from partners (USD)			Partnership agreements, financial reports	Semi-annually

Step 6: Co-Creating Systems Orchestration Strategies Activity

Consultation Sessions 6.1: Front-Line Stakeholders

To pinpoint the strategies that will drive system integration and scaled impact, you'll run two complementary sessions.

Part 1- Consultations with front-line stakeholders

Below is the first of two sessions in Step 6, focused on gathering insights directly from those delivering and receiving the intervention. Use these guidelines to structure consultations with front-line stakeholders and ensure their experiences shape your strategy design:

- ***Purpose:*** *Confirm exactly which activities participants perform and front-line actors lead, while gathering their feedback on quality, relevance, and opportunities for improvement.*
- ***Participants:*** *Include current and prospective participants, field agents and implementers, and local administrative, technical, and traditional leaders.*
- ***Logistics:*** *Prepare focus-group or interview guides (with optional surveys), combine site visits with group discussions to explore outcomes, and then summarize and share the findings.*
- ***Timing:*** *Schedule 1–2-hour sessions early in the Preparation phase, keeping surveys light unless robust data are needed for advocacy.*
- ***Deliverables:*** *A visual map of participants' key activities; participant perspectives on strategy quality and improvements; a shortlist of strategies that attract and motivate future participants; and implementer suggestions for stronger support.*

Use these prompts to uncover how participants experience and engage with the program, what motivates or hinders their involvement, and what additional activities or supports would improve their participation.

1. Which program activities do you take part in, and how often?
2. What motivates you to join and keep participating?
3. Which activities do you avoid, and why?
4. What would make participation easier or more appealing?
5. What conditions help you engage most effectively?
6. What challenges hinder your involvement, and how could we address them?
7. What new strategies or activities should the program add?
8. Are there similar programs you know? How do they compare?
9. What other activities have you started because of this program?

Workshop Session 6.2: System-integration Scoping

Part 2- System-Integration Scoping Workshops

Here's the second session for Step 6, designed to bring broader stakeholders together to refine and validate the strategies identified in your front-line consultations:

- ***Purpose:*** *Ensure all stakeholders grasp core strategies and their roles, spotlight which strategies align (or don't) with institutional capacities, and agree on the approaches driving system integration and scaled impact.*
- ***Participants:*** *Convene ministry officials (national, regional, local) responsible for the intervention, leaders from related ministries and partner organizations, and civil-society and private-sector representatives positioned to support scale.*
- ***Logistics:*** *Embed strategy reviews alongside outcome discussions in the same workshop(s), and prepare a combined report that integrates front-line findings with strategy analysis.*
- ***Timing:*** *Hold a focused 2–3-hour session mid-Preparation, after front-line consultations, as either a standalone topic or a segment within a broader SO workshop.*
- ***Deliverables:*** *A partner-endorsed list of core strategies with noted strengths and gaps; an inventory of complementary approaches in use; and a draft strategy set to add to the formal Systems Orchestration Plan.*

Use these prompts to align on the intervention's core strategies, assess institutional readiness, and identify how partners can collaborate and strengthen systems for sustained scale.

1. What are the intervention's core strategies, and which are vital for long-term success?
2. How do these strategies fit your institution's mandate and goals?
3. How could we improve alignment and mutual benefits?
4. Which strategies should your institution lead, and what would you need to do so?
5. Are you prepared—by policy, capacity, and resources—to implement these strategies?
6. What steps or support would strengthen your implementation capacity?
7. How should institutions collaborate to align strategies and achieve success?

Worksheet 6.3: Defining Key Strategies to Achieve Systems Orchestration Objectives

Use this worksheet to translate each core outcome into concrete strategies, detailing both the technical "product" and the operational "process," and clarifying where fidelity or flexibility is required.

Instructions

Use this worksheet to translate each core outcome from Step 5 into a clear, actionable strategy. For each outcome:

1. Outcome: Write the core outcome you're targeting (from Step 5- Define Program Purpose and Core Outcomes).

   a. Strategy: Describe the high-level approach to achieve this outcome.

   b. Technical Elements: List the tools, methods, or content participants will use or receive.

   c. Operational Process: Detail the actions, workflows, and decisions needed to support participants (training, support, mobilization, monitoring and evaluation, etc.).

   d. Fidelity vs Flexibility: Note which aspects of this strategy must remain unchanged (fidelity) and which ca adapt (flexibility).

   e. Responsible Stakeholders: Identify who (institution and/or role) will lead and support this strategy.

   f. Resources Needed: Specify budgets, staff time, materials, or other inputs required.

Worksheet Sample 6.3: Defining Key Strategies to Achieve Systems Orchestration Objectives

Outcome	Strategy	Technical Elements	Operational Processes	Fidelity vs. Flexibility	Responsible Stakeholders	Resources Needed
180 % of community health workers trained to deliver the new curriculum by Year 1	Roll out a blended training program combining in-person workshops with mobile learning modules	• Workshop slides and facilitator guides • Mobile app with video lessons and quizzes • Printed job aids	• Schedule regional training workshops • Assign master trainers to mentor cohorts • Push weekly app reminders and monitor completion rates • Collect feedback via in-app surveys	Fidelity: Core curriculum content, workshop sequencing Flexibility: Scheduling approach, choice of digital vs. print job aids	Ministry of Health Training Unit (lead) • CARE monitoring and evaluation specialist (support) • Local NGO trainers (delivery)	• Workshop venues and refreshments • Trainer costs (US $10 k) • Mobile data bundles (US $2 k) • Monitoring and evaluation staff time (0.2 FTE)

Step 7: Identify Stakeholder Roles and Functions Activity

Workshop Session 7.1: Key Stakeholders' Roles and Responsibilities

Having identified the "Key Stakeholders" from each sector and across the administrative levels for the respective functions of an intervention, this worksheet aims to help a CARE country team work with the full group of these stakeholders to attribute the main roles and responsibilities for the intervention's system integration and sustained implementation at scale across the respective sectors. Of concern are (i) identifying the main strategic dimensions for each responsibility, looking at an intervention's policy, operational, and technical aspects and (ii) listing the key stakeholders for each institutional sector that have a role in each responsibility's fulfillment. The questions that follow the template should help each respective stakeholder identify precisely the strategic roles and responsibilities that it must fulfill and for which it will be accountable.

Responsibility	**Identifying Main Strategic Dimensions for the Responsibility**		
1. Policy-setting and Enforcement			
List the key system stakeholders for this responsibility at all administrative levels from …			
Government	Civil Society	Private Sector	International Partners
_____	_____	_____	_____
2. Planning and Budgeting			
List the key system stakeholders for this responsibility at all administrative levels from …			
Government	Civil Society	Private Sector	International Partners
_____	_____	_____	_____
3. Technical Design and Implementation			
List the key system stakeholders for this responsibility at all administrative levels from …			
Government	Civil Society	Private Sector	International Partners
_____	_____	_____	_____
4. Monitoring and Evaluation			
List the key system stakeholders for this responsibility at all administrative levels from …			
Government	Civil Society	Private Sector	International Partners
_____	_____	_____	_____

Worksheet 7.2: Identifying Key Stakeholders' Roles and Responsibilities (Part 1)

Questions for Each Key Stakeholder about Their Roles and Responsibilities

Asking the following questions of key host system stakeholders should be an effective way to get them to start thinking about the roles they will need to assume as financial and operational responsibility of the intervention and its respective components shift to them. Asking these questions at the start of the Systems Orchestration process is unlikely to result in full comprehensive or even satisfactorily accurate responses. The idea is to get the ball rolling. This includes enlisting the key stakeholders to add their own probing questions that will allow them and the designated CARE Country Office team to dig more deeply into the few "main questions." There will be many future opportunities to enrich or correct what the key stakeholders answer here, particularly as concern their roles and responsibilities once system integration has occurred and they drive the intervention's scaled implementation.

Question #1: What does your structure presently do to implement or support implementation of the intervention and/or one or more of its strategic components you do currently to support the intervention?
Probing Questions:

1. What are the specific associated responsibilities or tasks that your structure fulfills?
2. Who is responsible for these different tasks?
3. What capacities–i.e., knowledge, skills, and authority–and capabilities–e.g., time, resources, logistical means, and support does each person have to fulfill the associated responsibilities or tasks?
4. Other questions?

Question #2: What does your structure presently do to implement or support implementation of the intervention and/or one or more of its strategic components you do currently to support the intervention?
Probing Questions:

1. Are there adequate personnel assigned to the intervention's and its respective components' implementation, in terms equally of their numbers, officially assigned roles, availability / "bandwidth", location, capacity, motivation, and other factors?
2. Do personnel have access to the resources, logistics, and other items they require to fulfill their associated responsibilities?
3. Do top leaders pay attention to the intervention's and its respective components' effective and consistent implementation and results, receiving relevant information, comparing performance to established standards and benchmarks, holding responsible personnel accountable, etc.?
4. Other questions?

Worksheet 7.2: Key Stakeholders' Roles and Responsibilities (Part 2)

Questions for Each Key Stakeholder about Their Roles and Responsibilities

Question #3: What steps must or can your structure take to fulfill its complete responsibilities for the intervention's and its respective components' effective and consistent implementation and achievement at scale of the expected results for the people the intervention is intended to serve?

Probing Questions:

1. What are the main differences between the stakeholder's current responsibilities for the intervention and its respective components, considering equally the many tasks themselves and the quality with which the stakeholder fulfills these?
2. What must happen to close any gaps, considering equally policies, personnel, budget, resources, plans, monitoring, evaluation, and accountability, and other strategic considerations?
3. Who will be responsible for taking the necessary steps, and who must be involved or consulted to authorize or enable their completion?
4. Other questions?

Question #4: What assistance do you need or will be useful from external partners to be able to fulfill completely your responsibilities for the intervention's system integration and sustained scaling?

Probing Questions:

1. In which areas do your various staff require strengthened capacity, including in the intervention's technical dimensions and to manage its scaled dissemination and operation?
2. Are their aspects of your operating systems for which assistance could be useful; for example, planning, budgeting, monitoring and evaluation, communication, and coordination of efforts?
3. How can partners support the host system structures responsible for training, supervising, and supporting front-line implementers to perform their functions effectively and consistently.
4. Other questions?

Worksheet 7.3: Orchestration Functions and Their Responsible Sectors

This worksheet serves two purposes. The first is to engage stakeholders in laying out the specific functions that will comprise the Systems Orchestration process and, for each function, the associated tasks and deliverables. The second is to identify the stakeholder groups, or sectors, that will play a major role ("X") in the intervention's system integration and sustained scaling and which will play a secondary role ("x") or no role (" ") at all. The worksheet identifies a set of generic tasks that should pertain to all, or at least most, interventions, expecting stakeholders to elaborate upon these for the intervention's particular technical domain and the host system context.

Orchestration Functions, with Tasks and Deliverables	**Responsible Sector(s)**			
	Government	**Civil Society**	**Private Sector**	**International Partner**
1. Support the establishment of a uniform version of the intervention to which all implementers and funders will adhere				
2. Support continued validation and introduction of new and improved technical elements (techniques, inputs, products, methods, etc.) to strengthen outcomes				
3. Support production of guidelines, notes, and other informational materials on the many technical aspects of the intervention's model and methods for use by trainers, agents, farmers				
4. Support the consolidation of training delivery and capacity related to the intervention's respective technical domains and partners				
5. Support to strengthen the quality and impacts of technical support provided to the program participants and to the front-line implementers who serve them				
6. Support to strengthen, harmonize, and streamline the intervention's operational aspects, concerned by every component, as relevant				
7. Support to strengthen and streamline the monitoring and evaluation of the intervention's implementation and out-comes, looking at all components separately and together				
8. Support the creation or identification and operation of institutional structures and strategies for ensuring coordination across all an intervention's sectors and stakeholders—by technical domain, by administrative level, and by partner sector—and to promote accountability				

Worksheet Sample 7.3: Orchestration Functions and Their Responsible Sectors (Part 1)

Orchestration Functions, with Tasks and Deliverables	Responsible Sector(s)			
	Government	Civil Society	Private Sector	International Partner
1. Support the establishment of a uniform version of the intervention to which all implementers and funders will adhere • Study of the full group of Farmer Field programs in Nepal to identify where they diverge and converge, agreeing on "best practices" to merge and to share and proliferate • Articulation of "non-negotiable" standards of a core model, methods, and outcomes (referring to all of the bullets below) • Agreement on a uniform name for FFBS, one that all stakeholders will use • Explanation of the scope and options for diverging from and adding to the standards • Establishment of steps and assignment of responsibilities for enforcing adherence • Analyzing and, as appropriate, revising or creating policy to ensure it is supportive of FFBS implementation and outcomes • Field testing of manual and improvement for wider use • Adaptation of FFBS strategies and other elements to suit the model and methods to the realities of the Nepali context, without compromising the model's integrity and impacts and understanding that changes to the prevailing context may be desirable and necessary	X	X	X	X
2. Support continued validation and introduction of new and improved technical elements (techniques, inputs, products, methods, etc.) to strengthen outcomes • Identification, adaptation, and validation of existing improved elements (innovation), looking to local research institutions, international programs/ initiatives, and the respective system structures at municipal level • Monitoring of Farmer Groups to capture (and adapt) new local "best practices" for sharing Research and development activities by many actors: researchers; farmers; agents; etc. • Follow and analyze the diffusion of technical elements, focusing on the quality of the element and of the diffusion model and efforts	X	X	X	X

Worksheet Sample 7.3: Orchestration Functions and Their Responsible Sectors (Part 2)

Orchestration Functions, with Tasks and Deliverables	Responsible Sector(s)			
	Government	Civil Society	Private Sector	International Partner
3. Support production of guidelines, notes, and other informational materials on the many technical aspects of the intervention's model and methods for use by trainers, agents, farmers, • Link to #2 • Connecting to existing research and innovation	x	x	x	x
4. Support the consolidation of training delivery and capacity related to the intervention's respective technical domains and partners • Production and/or provision of training curricula, agendas, and modules, including content, pacing, timing, delivery strategies and contexts, … • Training of trainers, specifying the structures that will be responsible for this at each level and in each location (e.g., extension agents, ag. college instructors, university professors, consultants, etc.) in the technical content and effective training methods; cascading to reach scale, but relying on technical support and MEL to maintain quality and adherence to the standards • Strengthening of the respective institutions engaged in training trainers and extension agents working in the four technical domains, with training content, methods, and strategies • Development and introduction into practice of digital content and tools for use by trainers and agents linked to the four FFBS technical domains • Ensure clarity on who does and who pays for services	x	x	x	x
5. Support to strengthen the quality and impacts of technical support provided to the program's participants and to the front-line implementers who serve them • Key FFBS strategies and other technical elements appear explicitly in sector plans and budgets at all administrative levels, assigned to the respective stakeholders • Identification and assignment of staff to cover all operational and technical aspects of FFBS implementation, ensuring they have both the necessary capacity and capability • Monitoring, guidance, and enforcement to ensure that all assigned staff are successfully fulfilling their FFBS related responsibilities according to plan • Efforts to improve the quality of the stakeholders' operational capacity and performance, including the introduction of new procedures, documentation, training, oversight and support practices, budget, etc. • Strengthening of internal and external communications, with new practices, routine contact, digital tools, etc. • Implementation of the respective FFBS strategies • Creation and operation of structures and strategies (perhaps, e.g., with a digital platform) to capture the model's implementation ("paying attention"), cultivating quality and efficiencies by communicating, aligning, merging, etc. the operations of the different stakeholders as appropriate, both within and across the four technical domains	x	x	x	x

Worksheet Sample 7.3: Orchestration Functions and Their Responsible Sectors (Part 3)

Orchestration Functions, with Tasks and Deliverables	Responsible Sector(s)			
	Government	Civil Society	Private Sector	International-Partner
6. Support to strengthen, harmonize, and streamline the intervention's operational aspects, concerned by every component, as relevant • Key FFBS strategies and other technical elements appear explicitly in sector plans and budgets at all administrative levels, assigned to the respective stakeholders • Identification and assignment of staff to cover all operational and technical aspects of FFBS implementation, ensuring they have both the necessary capacity and capability • Monitoring, guidance, and enforcement to ensure that all assigned staff are successfully fulfilling their FFBS related responsibilities according to plan • Efforts to improve the quality of the stakeholders' operational capacity and performance, including the introduction of new procedures, documentation, training, oversight and support practices, budget, • Strengthening of internal and external communications, with new practices, routine contact, digital tools, … • Implementation of the respective FFBS strategies • Creation and operation of structures and strategies (perhaps, e.g., with a digital platform) to capture the model's implementation ("paying attention"), cultivating quality and efficiencies by communicating, aligning, merging, etc. the operations of the different stakeholders as appropriate, both within and across the four technical domains	x	x	x	x
7. Support to strengthen and streamline the monitoring and evaluation of the intervention's implementation and out-comes, looking at all components separately and together • Identification or elaboration of indicators, tools, and collection and reporting protocols, covering activities and results and for use by all FFBS implementers and other stakeholders • Strengthening of capacity and capability to gather, analyze, and share and MEL findings • Establishment or consolidation of strategies for using data and analysis to inform individual and stakeholder decisions and actions, related to the model and methods and to how these are introduced and supported in practice • Development and adoption of digital tools for the collection and transmission of data and for the sharing of and MEL results, including the creation and use of dashboards • Engagement of research institutions to deepen understanding of FFBS aspects that data show warrants further attention	x	x	x	x

Worksheet Sample 7.3: Orchestration Functions and Their Responsible Sectors (Part 4)

Orchestration Functions, with Tasks and Deliverables	Responsible Sector(s)			
	Government	Civil Society	Private Sector	International Partner
8. Support the creation or identification and operation of institutional structures and strategies for ensuring coordination across all an intervention's sectors and stakeholders—by technical domain, by administrative level, and by partner sector—and to promote accountability • Creation or identification, and ongoing operation, of steering committees at the national, provincial, municipal, and ward levels. Each committee meets regularly and includes representatives from all relevant technical domains (agriculture, health, nutrition, etc.), and institutional sectors (government, civil society, private sector). • Creation and operation of a unified FFBS reporting dashboard and adoption of procedures for keeping it up to date • Production of an annual FFBS report to which all implementing organizations and funders contribute • Regular sharing and coordination meetings by implementing organizations and funders, convened by the Ministry of Agriculture (?) • Maximize mediatization of FFBS successes, quantitative but especially qualitative	x	x	x	x

Step 8: Create Your Systems Orchestration Plan Activity

Workshop Session 8.1: Principal Strategies for a Comprehensive Systems Orchestration Plan (Part 1)

In this session, you'll bring together all the insights, strategies, and stakeholder commitments you've developed in Steps 1–7 to draft a detailed, multi-year orchestration plan. Through a series of consultations and working sessions, you'll define your objectives, map responsibilities, set timelines and budgets, and secure formal endorsements—ensuring every partner is ready to implement and maintain the intervention at scale.

- ***Purpose:*** *You will draft a multi-year plan and budget to guide system integration and scaling. You will enlist key stakeholders in the orchestration process, clearly define their roles, and secure commitments from all participants, including CARE's Country Office.*
- ***Participants:*** *You will convene officials from the lead ministry at national, regional, and local levels alongside representatives of related ministries and partner agencies, plus civil-society, private-sector, and international actors who will support or implement the orchestration plan.*
- ***Logistics:*** *You will organize a series of consultations and workshops to co-create each element of the plan. Following these sessions, you will document and share the consensus findings, then conduct follow-up outreach to confirm that every stakeholder is prepared to fulfill their assigned role.*
- ***Timing:*** *Planning should begin immediately after completing Step 7-Identify Stakeholder Roles and Functions and proceed over several months with regular check-ins. The orchestration plan's roll-out is expected to span multiple years.*
- ***Results and Deliverables:*** *At the end of this phase, you will have a comprehensive orchestration plan that specifies objectives, activities, timelines, responsibilities, and budget. Each stakeholder will formally endorse the plan and appoint a representative, and you will have institution-specific action plans ready for scaled implementation.*

Note: CARE will also create an internal budget, staffing plan, and support framework to guide and sustain the orchestration process.

Workshop Session 8.1: Principal Strategies for a Comprehensive Systems Orchestration Plan (Part 2)

Use these focused prompts in your multi-sector workshops or core planning sessions to steer strategic decisions before drafting your Systems Orchestration plan. They'll help you align on critical choices—what must be standardized, who should lead, and how to adapt the intervention for durable, system-wide scale—paving the way for a coherent, actionable orchestration road map.

1. Situational Analysis: What other programs share the selected intervention's goals or methods? How do they differ in objectives, strategies, implementation, and monitoring and evaluation? Which elements conflict, and where could you compromise or align?
2. Consensus Around a Unified Version: What minimum standards (objectives, strategies, indicators) must everyone adopt? Which aspects can be varied or adapted? Who will monitor, communicate, and enforce those standards—and how?
3. Identification of a Lead Structure: Which institution already oversees this intervention (or similar ones)? Which institution has the mandate, capacity, and buy-in to lead? Who else must agree to that choice?
4. Co-creation of a Comprehensive Strategy: How will the intervention look once fully integrated—covering objectives, roles, resources, timing, and technical elements? What are the key steps to get there (e.g., benchmarks, new sites, unified materials, training, ongoing monitoring)? What role will each stakeholder play, including financing?
5. Scope of Work for the Lead Structure: What direct implementation tasks will the lead structure handle? What oversight, coordination, and leadership duties will it have? What resources and skills must it mobilize, and who will fill each role? What deliverables must it produce—and by when?
6. Elaboration of a Strategy for Front-Line Implementation: Which local structures currently manage training, support, and referrals? Which adjacent organizations (e.g., local government, traditional leaders) could help? How can these groups evolve to support scaled delivery? Who will supervise and guide them—how will they coordinate?
7. Identification of Collaborating Structures: Which other actors (central, regional, local) are essential to success? How do they connect to participants and front-line agents—and how can those links be strengthened?
8. Adaptation to Prevailing System Conditions: What changes does the "hot-house" model require to fit real-world conditions, considering: Cost per participant, front-line capacity, resource access, priority needs, institutional capabilities, coordination with other initiatives, and local constraints.
9. Elaboration of a Monitoring and Evaluation Strategy: Which indicators will track participant impacts? Which indicators will track implementation quality? What tools and processes will collect and analyze these data? How will you use findings to refine the strategy and outcomes?

Worksheet 8.2: Experience and Expertise Required for Systems Orchestration – Host System Staff Capacity (Part 1)

This worksheet aims to guide a CARE country team's leadership in working with each respective host system institution, or structure, that will have responsibility for an intervention's system integration and sustained scaling to appraise its internal capacity to assume their associated roles and responsibilities. It builds from the "Orchestration Functions and Their Responsible Sectors" worksheet, adding the experience and expertise required of a host system structure's staff to fulfill these responsibilities. In the final column, System Staff Capacity, a structure's leadership signals the degree to which its current staff has the necessary experience and expertise, indicating "3 – strong," "2 – moderate," "1 – weak," or "0 – none." In the following worksheet, leadership finds guidance to identify the reasons for the capacity appraisal for each function and to indicate steps to address any shortfalls.

Task/Deliverable	Experience	Expertise	CARE Staff Capacity
1. Support production of a uniform model			
• Draw from Worksheet 7.3	_____	_____	_____
_____	_____	_____	_____
2. Support strengthening of technical elements, across domains			
• Draw from Worksheet 7.3	_____	_____	_____
_____	_____	_____	_____
3. Support production of technical materials			
• Draw from Worksheet 7.3	_____	_____	_____
_____			_____
4. Support strengthening of training delivery and capacity			
• Draw from Worksheet 7.3	_____	_____	_____
_____		_____	_____
5. .Support strengthening of technical support delivery and capacity			
• Draw from Worksheet 7.3	_____	_____	_____
_____	_____	_____	_____
6. Support strengthening of procedures and capacity to operationalize the intervention			
• Draw from Worksheet 7.3	_____	_____	_____
_____	_____	_____	_____
7. Support strengthening of Monitoring, Evaluation, and Learning (MEL) strategy and capacity			
• Draw from Worksheet 7.3	_____	_____	_____
8. Support coordination and accountability across the intervention's stakeholders			
• Draw from Worksheet 7.3	_____	_____	_____

Worksheet 8.2: Experience and Expertise Required for Systems Orchestration – Host System Staff Capacity (Part 2)

This worksheet aims to support a CARE country team in guiding leadership from each concerned host system institution to identify the reasons for its internal capacity appraisal for the respective functions and to indicate steps to address any shortfalls. Looking at reasons, a host system institution may not have adequate staff capacity mainly because: (i) no one or too few staff members have the required technical capacity (TC); or (ii) those with the necessary technical capacity have other responsibilities that result in their not having bandwidth availability (BA) to fulfill the various Systems Orchestration roles adequately. Obvious options for addressing capacity shortfalls include:
(i) training (T); (ii) hiring, whether to recruit (R) the required capacity or to provide bandwidth to staff who already possess the capacity; (iii) bringing in outside expertise (OE), from the respective sectors.

Task/Deliverable	Reasons			Responses				CARE Staff Capacity
	TC	BA	Other	T	R	OE	Other	
1. Support production of a uniform model								
• From Part 1	_____			_____				3 – 2 – 1 – 0
_____								3 – 2 – 1 – 0
2. Support strengthening of technical elements, across domains								
• From Part 1	_____			_____				3 – 2 – 1 – 0
_____	_____			_____				3 – 2 – 1 – 0
3. Support production of technical materials								
• From Part 1	_____			_____				3 – 2 – 1 – 0
_____	_____			_____				3 – 2 – 1 – 0
4. Support strengthening of training delivery and capacity								
• From WPart 1	_____			_____				3 – 2 – 1 – 0
_____	_____			_____				3 – 2 – 1 – 0
5. Support strengthening of technical support delivery and capacity								
• From Part 1	_____			_____				3 – 2 – 1 – 0
_____								3 – 2 – 1 – 0
6. Support strengthening of procedures and capacity to operationalize the intervention								
• From Part 1	_____			_____				3 – 2 – 1 – 0
_____	_____			_____				3 – 2 – 1 – 0
7. Support strengthening of Monitoring, Evaluation, and Learning (MEL) strategy and capacity								
• From Part 1	_____			_____				3 – 2 – 1 – 0
8. Support coordination and accountability across the intervention's stakeholders								
• From Part 1	_____			_____				3 – 2 – 1 – 0

Worksheet 8.3: Experience and Expertise Required for Systems Orchestration – CARE Staff Capacity (Part 1)

This worksheet aims to guide a CARE country team's leadership to appraise its internal capacity to shift from direct implementation of an intervention to a Systems Orchestration role. It builds from the "Orchestration Functions and Their Responsible Sectors" worksheet, adding the experience and expertise required of CARE staff to fulfill these responsibilities. In the final column, CARE Capacity, the leadership signals the degree to which its current staff has the necessary experience and expertise, indicating "3 – strong," "2 –moderate," "1 – weak," or "0 – none." In the following worksheet, leadership finds guidance to identify the reasons for the capacity appraisal for each function and to indicate steps to address any shortfalls.

Task/Deliverable	Experience	Expertise	CARE Staff Capacity
1. Support production of a uniform model			
• From Worksheet 8.2	_____	_____	3 – 2 – 1 – 0
_____			3 – 2 – 1 – 0
2. Support strengthening of technical elements, across domains			
• From Worksheet 8.2	_____	_____	3 – 2 – 1 – 0
_____	_____	_____	3 – 2 – 1 – 0
3. Support production of technical materials			
• From Worksheet 8.2	_____	_____	3 – 2 – 1 – 0
_____	_____	_____	3 – 2 – 1 – 0
4. Support strengthening of training delivery and capacity			
• From Worksheet 8.2	_____	_____	3 – 2 – 1 – 0
_____	_____	_____	3 – 2 – 1 – 0
5. Support strengthening of technical support delivery and capacity			
• From Worksheet 8.2	_____	_____	3 – 2 – 1 – 0
_____			3 – 2 – 1 – 0
6. Support strengthening of procedures and capacity to operationalize the intervention			
• From Worksheet 8.2	_____	_____	3 – 2 – 1 – 0
_____			3 – 2 – 1 – 0
7. Support strengthening of Monitoring, Evaluation, and Learning (MEL) strategy and capacity			
• From Worksheet 8.2	_____	_____	3 – 2 – 1 – 0
8. Support coordination and accountability across the intervention's stakeholders			
• From Worksheet 8.2	_____	_____	3 – 2 – 1 – 0

Worksheet 8.3: Experience and Expertise Required for Systems Orchestration – CARE Staff Capacity (Part 2)

This worksheet aims to guide a CARE country team's leadership to identify the reasons for the capacity appraisal for each function and to indicate steps to address any shortfalls. Looking at reasons, a CARE country office may not have adequate staff mainly because: (i) no one or too few members have the required technical capacity (TC); or (ii) those with the necessary technical capacity have other responsibilities that result in their not having bandwidth availability (BA) to fulfill the various Systems Orchestration roles adequately. Obvious options for addressing capacity shortfalls include: (i) training (T); (ii) hiring, whether to recruit (R) the required capacity or to provide bandwidth to staff who already possess the capacity; (iii) bringing in outside expertise (OE), from CARE International or consultants.

Task/Deliverable	Reasons			Responses				CARE Staff Capacity
	TC	BA	Other	T	R	OE	Other	
1. Support production of a uniform model								
• From Worksheet 8.2	_____			_____				3 – 2 – 1 – 0
_____	_____			_____				3 – 2 – 1 – 0
2. Support strengthening of technical elements, across domains								
• From Worksheet 8.2	_____			_____				3 – 2 – 1 – 0
_____	_____			_____				3 – 2 – 1 – 0
3. Support production of technical materials								
• From Worksheet 8.2	_____			_____				3 – 2 – 1 – 0
_____	_____			_____				3 – 2 – 1 – 0
4. Support strengthening of training delivery and capacity								
• From Worksheet 8.2	_____			_____				3 – 2 – 1 – 0
_____	_____			_____				3 – 2 – 1 – 0
5. Support strengthening of technical support delivery and capacity								
• From Worksheet 8.2	_____			_____				3 – 2 – 1 – 0
_____	_____			_____				3 – 2 – 1 – 0
6. Support strengthening of procedures and capacity to operationalize the intervention								
• From Worksheet 8.2	_____			_____				3 – 2 – 1 – 0
_____	_____			_____				3 – 2 – 1 – 0
7. Support strengthening of Monitoring, Evaluation, and Learning (MEL) strategy and capacity								
• From Worksheet 8.2	_____			_____				3 – 2 – 1 – 0
8. Support coordination and accountability across the intervention's stakeholders								
• From Worksheet 8.2	_____			_____				3 – 2 – 1 – 0

Step 9: Implement the Systems Orchestration Plan Activity

Worksheet 9.1: CARE Support Plan for the Systems Orchestration Strategy

1. Conduct a Diagnostic Study
   Analyze current SGs (Savings Groups) programs to identify similarities and differences across models.

2. Convene Key SG Stakeholders
   Align on system integration goals. Agree on core minimum standards.

3. Identify a Lead Structure
   Consult stakeholders. Establish a national body to guide SG program implementation.

4. Co-create a Comprehensive Strategy with Stakeholders
   Organize a strategy workshop. Develop a system-driven implementation approach.

5. Develop a Scope of Work for the National Structure (Based on Strategy)
   Outline roles, responsibilities, and key connections. Align outputs with national SG program goals.

6. Identify Local Structures
   Define roles of local actors and support systems. Develop scopes of work for successful SG operations.

7. Elaborate a Strategy, with Tools and Resources
   Design a Village Agent Network strategy. Include tools for SG training and capacity building.

8. Identify Critical Collaborating Structures

9. Map how SGs and Village Agents support broader development. Align partnerships to scale community impact.

Workshop Session 9.2: Staff Audit and Operational Planning (Part 1)

In this session, CARE Country Office teams assess their internal capacity to deliver on the eight orchestration support functions by conducting a structured staff audit and mapping the operational and logistical requirements needed to implement the Systems Orchestration plan. This session will help identify who can lead or support key functions, determine where staffing or skills gaps exist, and align operational planning with the orchestration strategy.

Through this process, teams will:

- Confirm readiness to shift from direct implementation to orchestration support.
- Make staffing decisions (reassign, train, hire, or consult).
- Identify the resources, roles, timelines, and costs associated with orchestration support activities.

Use these prompts to guide your internal CARE Country Office discussions on how to operationalize and resource the orchestration support plan.

A. Conducting a Staff Audit

1. Staffing Overview:
   What orchestration support functions are required for implementation, and what level of technical expertise, management oversight, and time commitment will each function need?

2. Capacity and Mandate:
   Which current staff have the necessary skills, mandate, and interest to fulfill each function?
   Are there staff who could take on new orchestration-related responsibilities with additional support or reallocation of time?

3. Skills and Gaps Analysis:
   What are the key skill or capacity gaps within the current team?
   Which functions can be reassigned internally, and which will require external hiring, consultant engagement, or support from regional or HQ teams?

4. Training and Orientation Needs:
   What training or orientation do reassigned staff need to understand orchestration principles and how they differ from traditional project management approaches?
   How will you ensure staff are supported to develop both technical and interpersonal skills relevant to orchestration?

Workshop Session 9.2: Staff Audit and Operational Planning (Part 2)

5. Action Planning:
   How will you manage transitions for reassigned roles, including backfilling original responsibilities or adjusting workloads?
   Which roles need temporary vs. permanent coverage

B. Operational and Logistical Planning

6. Activity Mapping:
   What operational and logistical activities must CARE undertake to deliver orchestration support? (e.g., steering committee meetings, technical assistance, coordination, monitoring and evaluation, training, production of materials)

7. Resource Requirements:
   What financial, material, and human resources will be needed to carry out these activities effectively?
   How will CARE allocate costs and budget lines to cover transport, lodging, materials, and staff time?

8. Timeline and Deliverables:
   What are the priority timelines for each activity or function?
   How will you sequence internal CARE actions to align with the host institution's orchestration plan?

9. Coordination and Oversight:
   How will CARE coordinate across departments (e.g., programs, operations, finance) to ensure orchestration support is delivered efficiently and consistently?
   What internal reporting mechanisms will track progress?

Output:

By the end of this session, the CARE Country Office should have:

- A clear understanding of staffing readiness and required adjustments
- Identified training and recruitment needs
- A draft operational and logistical plan with estimated costs and responsibilities.

ACKNOWLEDGMENTS

The aim of this Playbook is to identify issues and elaborate steps that will help country offices to undertake their own Systems Orchestration initiatives. Its creation is the result of technical accompaniment by Geneva Global, which CARE's Impact at Scale team engaged in 2022 to work with CARE Nepal and CARE Rwanda to elaborate Systems Orchestration strategies for, respectively, their Farmer Field and Business School (FFBS) and Village Savings and Loan Association (VSLA) programs. The resulting Playbook draws heavily on the two experiences and is, therefore, also the product of valuable input from several members of the two country teams and relevant program teams. It was also developed in partnership with a variety of essential stakeholders who kindly provided their time and expertise to help ensure its relevance and utility.

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