

ANNEX 1: TERMS OF REFERENCE FOR THE IMPLEMENTATION OF THE PROJECT IN LATIN AMERICA

Background

The Inter American Institute for Cooperation in Agriculture (IICA) and the Technical Centre for Agricultural and Rural Cooperation ACP-EU (CTA) entered into a Memorandum of Understanding in October 2012, which remained in effect for three years and provided a framework for meaningful collaboration between both institutions. This yielded benefits in areas such as youth and women networks in the Caribbean, the support of value chain development for priority commodities, or the development of knowledge management and communication platforms for stakeholders in the agriculture sector. A new Memorandum of Understanding between both organizations was signed in November 2015, serving as an overall framework within which CTA and IICA are to collaborate on projects and other activities of mutual interest for the ultimate benefit of agricultural and rural development in the Caribbean region.

At the same time, IICA and CTA have been collaborating on the partnership-based distance learning initiative entitled the Information Management Resource Kit (IMARK) since 2001. CTA and IICA are key members of the IMARK Steering Group in which CTA, IICA, FAO and other partners jointly plan and develop distance learning materials in information, knowledge and communication management.

At the 2014 IMARK Steering Group meeting, hosted by UNESCO in Paris, France, members agreed to proceed with the development of the English version of the IMARK course entitled: “Experience Capitalization”. CTA and IICA contributed to the curriculum design for the “Experience Capitalization” e-learning course by participating to the consultative learning needs assessment workshop, which took place 25-27 March 2014 in FAO HQs Rome, Italy. The content was then, in a first instance, developed in English, based on the outcomes of the curriculum design workshop, which gathered worldwide experts from GIZ, IFAD, WFP, CGIAR, ETC Foundation, F3E, FRI, GRET, Helvetas Swiss Inter-cooperation, IICA, UNDP.

In 2015, IICA and CTA, together with FAO, prepared a project proposal which was submitted to and later approved by IFAD. The Project, “Capitalizing on experiences for Greater Impact in Rural Development”, is meant to help improve the quality of rural development initiatives and ensure better results in the fight against poverty. The main objective is the sustainable adoption of experience capitalization as an approach for continuous learning, improvement and scaling up in rural development initiatives. This is a three-year project implemented in different parts of the world, and which requires specific activities in the Latin American and the Caribbean region.



Objectives

To facilitate the adoption of an experience capitalization process in rural development initiatives in at least five countries in Latin America and the Caribbean, where it can be used to improve the analysis, documentation, sharing and the adoption of lessons and good practices.

This includes specifically,

- To support the development of the Spanish version of the IMARK e-learning course entitled: “Experience Capitalization”.
- To implement actions related with the Capitalization of Experiences for Greater Impact in Rural Development in Latin America and the Caribbean.

Results

- Organizations in at least three countries from Latin America and the Caribbean will mainstream the use of experience capitalization processes in order to improve their rural development interventions;
- The region will increase its knowledge exchange about experience capitalization as a result of the library services, the adaptation of the e-learning course and the facilitation of different capitalization processes.

Main activities

As part of its own contribution to the Project, and also with funds provided by the Project grant, IICA will be responsible for the following activities in the region:

1. Mapping exercise and base line

IICA will develop a virtual survey to identify projects and organizations interested in starting an experience capitalization process, in joining the emerging community of practice, supporting with content the library and the directory of experts; and in developing the necessary skills to implement and institutionalize it as an approach in at least five countries in Latin America. This exercise will include, but not be limited to, the projects and activities run by the different IICA offices in the region. The call will be open and can be expanded with through the networks of FAO, CTA and IFAD. Such mapping exercise will allow the definition of a base line of the Project in order to evidence the expected changes in the short term.

Deliverable 1: List of interested projects and organizations, identifying those who can contribute to the overall Project on the basis of their own experience, as well as the potential cases that may benefit from the Project.

2. Translation and adaptation of learning material

IICA will translate the content of the IMARK e-learning module on experience capitalization from English to Spanish. All Spanish translation will be done by IICA. The translation of these lessons should be based on the English version of the MS-PowerPoint lesson storyboards, which include additional notes, annexes, job aids and popup boxes. The total number of words for the entire course is 162,888 words and will serve as a basis for the estimation of the language adaptation costs. Also, there may be a requirement to generate or adapt certain content not available in the original language, including: a) the selection of relevant case studies in Latin countries, which clearly demonstrate applications of the suggested practices covered in the course, b) the development of examples and exercises appropriate for learners in Latin or Spanish readers, c) the identification and description of additional Spanish language reference materials, recommended readings and resource pointers for the lessons and d) the creation of a specific glossary of technical terms. The Project will support an internship for such task.

As part of the facilitation process and training, IICA will be able to later validate the 13 e-learning lessons of the course “Experience capitalization”, meaning the literature review, content development, clearance of rights and contextualizing the material to the Spanish speaking countries in its last version. This is a critical activity related with the use of the learning material, allowing IICA to have a final version of the module in Spanish.

The development of the interactive version of 13 lessons in Spanish have being agreed to be done jointly with FAO with funds provided by the Project for such task. Even though this activity will be part of the agreement between CTA and FAO, IICA will provide its guidance to allow the final interactive version of the course suited for web delivery

Deliverable 2: Spanish content for e-learning course translated and adapted, ready to be used for mark-up under a separate agreement between FAO and CTA.

3. Organization of an internal presentation and of an “inception and planning meeting” for the region

Following the presentation sessions at FAO, IFAD and CTA, where the Project was presented to the staff of these organizations in October 2016, IICA will organize a similar meeting with its staff. Such meeting will occur face to face at headquarters, but connected with all Spanish speaking countries in the region using Webex technologies. This will serve to present the specific objectives and the approach designed by the Project, inviting IICA programs and projects to be part of the different activities in the region. An online conference in English will be jointly organized by CTA and IICA at a later stage, targeting the Caribbean Countries.

Deliverable 3: Short report about the connections of IICA with the Project and baselines improved.

Again, following the example of the meeting held in Rome in October 2016, where the Project's goal, objectives and activities were presented and discussed among experts representing different organizations, a similar meeting will take place at IICA Headquarters in San Jose, Costa Rica, with representatives of the organizations identified in the survey and mapping exercise mentioned above. The purpose will be to share the scope of the Project and to agree, together with all participants, on the methodology and approach to follow in the region. This meeting will also serve to identify potential trainers or facilitators, the best cases for an experience capitalization process, and to define a tentative plan for the following 20 months. This will serve to determine a regional baseline in terms of skills and also in terms of adoption and institutionalization of the approach. The Project will cover the travel and accommodation costs of twenty participants.

Deliverable 4: Meeting report and working plan for the following 20 months, including partners and stakeholders to benefit from the Project, as well as a regional baseline.

4. Facilitation of an experience capitalization processes & validation of learning content

In coordination with CTA, IICA will support the implementation of three capitalization processes in the region, run and implemented by its national delegations. This will entail selecting specific cases, identifying a list of people who need to be involved, finding information and organizing (and in this way describing each experience in detail), analyzing each case to draw conclusions, and preparing for the dissemination of the results. IICA will support the teams in charge to prepare a final document, and also prepare an "action plan" that will help ensure that the results of the capitalization process are shared and are also used, and which will serve as a guide for the institutionalization of the approach. The aim of such activity is mainstreaming of experience capitalization in national organizations, meaning that those who have been trained or have become trainers can then share their knowledge and build a chain effect towards other beneficiaries. The Project will finance the traveling and venue of each national training session, as well as follow up processes happening after the training related with the implementation of the ExCap. IICA will provide the coordination and logistics of each activity, including the involvement of IICA staff as part of their regular technical cooperation agenda.

Such process will allow the validation of the content of the e-learning course indicated in item 2.

Deliverable 5: Progress report for each case by country after 12 months of implementation of this agreement.

5. Contribution to the community of practice

As one of the results of the above mentioned meetings, as well as of the ongoing activities of the Project in the World, IICA will support the emerging community of practice on experience capitalization in the region, as an open space to share information and learn about an experience



capitalization approach in Spanish. IICA will engage with participants and representatives of different organizations and facilitate discussions in Spanish related with ExCap. It will be part of the Dgroups discussion forum already in use by the Project, and will also rely on other information systems already in use by IICA or being implemented under the portfolio of projects in the region, e.g. Sistema de Gestión Estratégica para el Desarrollo Territorial y la Agricultura Familiar (SiGET) (<http://portalsiget.net/pages/Default.aspx>).

Deliverable 6: Active CoP in Spanish linked to the Project efforts.

6. Experience capitalization library and Agriprofiles directory

IICA has been very active in the development of thematic repositories using DSPACE solutions and of professional's discovery databases using VIVO solutions to link better scientists, practitioners or others in a particular field. Part of the Project is to build and sustain a library with updated knowledge resources that can serve in the training process, support the community of practice and become a reliable information source for exchange of knowledge about experience capitalization. Similar to this, a database of people involved in the experience capitalization process will be relevant to know who is who in the region. Both solutions will serve not only the Latin American region but can also expand to benefit the rest of the regions involved in the Project. Both activities will be supported by IICA staff in their information and knowledge center. The link for AGRIPROFILES is <http://agriprofiles.agri-d.net/>, while library catalogs are located in <http://www.iica.int/en/information-resources>.

Deliverable 7: A thematic repository about Excap and the directory of professionals related with the topic, both techniques of knowledge management to improve interactions and activities in the field.

7. Coordination of activities

IICA will provide the overall coordination for all the above mentioned activities. A core coordination team at the Secretariat of Planning and Evaluation will ensure the planning, monitoring and success of the workflow and schedules. This team will be responsible of all reports and information to be submitted to CTA. When required, IICA will be responsible for all administrative matters concerning the organizing of events, travelling, and contracting, as well as necessary secretarial and clerical support.

Deliverable 8: Final technical and financial reports.



8. Implementation schedule and indicative budget

Activities	Provisional Timing	Estimated Costs involved	Budget CTA (US\$)	Budget IICA (US\$)
1. Mapping exercise and base line Fees for: <ul style="list-style-type: none"> • Development of virtual survey • Identification potential projects and organizations • Writing report 	April 2017	10 work days		5,000
2. Translation and adaptation of learning content <ul style="list-style-type: none"> • Translation services • Adaptation 	April – September 2017	64 work days over 6 months	3600	32,000
3. Organization of internal presentation <ul style="list-style-type: none"> • Staff time • Media launch and press release • Presentation of Project face to face and online 	April / May 2017	5 work days Lump sum		3,500 2,500
4. Inception and planning meeting <ul style="list-style-type: none"> • Fees • Air fares • Per diems • Accommodation • Other expenses 	April / May 2017	4 work days 20 x 1,000 20 x 50 x 4 20 x 100 x 5 Lump sum	20,000 4,000 10,000 1,000	2,000 4,500
5. Facilitation EC processes and validation of learning content <ul style="list-style-type: none"> • Fees • Air fares (2 facilitators, 3 countries, 2 meetings in each country) • Per diems (5 days per meeting) • Accommodation • Other expenses 	June 2017 – December 2018	120 work days 2 x 3 x 2 x 1,000 2 x 3 x 2 x 5 x 50 2 x 3 x 2 x 5 x 100 12 x 1,500	12,000 3,000 6,000 9,000	60,000
6. Contrib. CoP <ul style="list-style-type: none"> • Facilitation discussions • Platform available 	June 2017 – December 2018	10 work days Lump sum		5,000 5,000
7. Library and AgriProfile <ul style="list-style-type: none"> • Fees • Customizing platforms • Server upgrade & hosting 	September – December 2017	30 work days Lump sum Lump sum	5,000 12,000	15,000 10,000 6,000
Sub total			85,600	
8. Overall coordination <ul style="list-style-type: none"> • 8.1 % 			6,934	
TOTAL (USD)			92,534	150,500
TOTAL (Euro) [based on infoeuro March2017]			87,404	142,156

9. Road map, timeframe and source of resources required

	TRIMESTERS							
	II 2017	III 2017	IV 2017	I 2018	II 2018	III 2018	IV 2018	I 2019
MAPPING EXERCISE IN THE REGION ABOUT WHO IS WHO IN THE REGION	C							
TRANSLATION & ADAPTATION OF THE PPT FROM ENGLISH TO SPANISH	C	C	C/M					
INTERNAL PRESENTATION (1/2 DAY SESSION)		C						
INCEPTION AND PLANNING MEETING (4 DAY WORKSHOP)		C/M						
FACILITATION OF EC PROCESS AND VALIDATION OF LEARNING CONTENT		C/M	C/M	C/M	C/M	C/M	C/M	
FOLLOW UP OF THE THREE EXP. CAP. CASES				C/M	C/M	C/M	C/M	
DEVELOPING COMMUNITY OF PRACTICE – Agriprofiles component to include experts and practitioner of EXCAP and repository			C/M	C/M				
MANAGEMENT OF COMMUNITY OF PRACTICE AND KNOWLEDGE SHARING PLATFORM FOR SPANISH			C	C	C	C	C	C
COORDINATION OF EXCAP PROJECT IN LATIN AMERICA	C	C	C	C	C	C	C	C C
MAINTENANCE OF EXCAP LIBRARY OR REPOSITORY- INCLUSION OF EXPERIENCES					C	C	C	C C
MAINTENANCE OF EXCAP EXPERT AND PRACTITIONERS DIRECTORY (AGRIPROFILES)					C	C	C	C C
ONLINE FREE OPEN COURSE INSIDE IMARK SITE							C	C
PROMOTION OF THE AVAILABLE COURSE AND LINKAGES IN OTHER LEARNING PLATFORMS								C C

M= Money paid by Project

C= Financial Contribution of IICA can be formulated here

ANNEX 2: In kind contribution of IICA

IICA as agreed will support the Project with In-Kind contributions estimated as follows:

Professional Senior Staff at Headquarters and in 3 countries delegations: USD 88,500

Administrative local Staff at Headquarters and in 3 country delegations: USD 2,000

Translation services: USD32, 000

Lump sum for Venue and coffee breaks: USD 7,000

ICT solutions: USD 15,000

- AGRIPROFILES
- DSPACE
- IMARKSITE
- CoP

Hosting and servers: USD 6,000

