

KNOWLEDGE MANAGEMENT TOOL

LEARNING FOR REPLICATION: DOCUMENTING CHANGE IN DEMONSTRATION PROJECTS

CONTEXT AND PURPOSE OF THIS GUIDE

MPED partners are engaged in the implementation of demonstration projects¹ in various areas of local economic development (LED). On the basis of the specific needs of partners, various strategies and activities are utilized to achieve the expected results. In addition to the benefits they bring to local communities, these strategies and methods can also serve as examples of good practices to be replicated by other municipalities and shared in regional and global *fora*.

The documentation of lessons and good practices emerging from the demonstration projects is an essential feature of MPED. It requires gathering two types of data. First, the information reported by partners through the program planning and monitoring tools is utilized to **assess the progress achieved**. Second, there is a need to collect information and data related to the process of implementation, with the intent to **understand how the partners achieved results and why**.

These guidelines have been prepared to guide the demonstration project partners in collecting this second type of data². They offer broad guidance to assist partners to reflect and identify the key learning emerging from their experience. This reflexive process is a key step in identifying the good practices that could be replicated by other municipalities.

Good practices can be defined as: “programs or strategies that have produced successful outcomes, which are supported to some degree by objective data sources and other types of evidence”. Within the context of MPED, a good practice can be different aspects of a demonstration project, for example, how a municipality went about the design and planning of its LED strategy,

or how it succeeded in engaging community-based groups to increase agriculture productivity, etc.

The key steps leading to the systematization of the partners’ experience are presented below.

STEPS TO DOCUMENT CHANGE IN YOUR PROJECT

Step 1: Identify Who Will be Responsible for Leading the Process

The partners should decide who will be responsible for leading the process. A small task group (TG) composed of (ideally 3-5) representatives of the main project stakeholders should be in charge, with their role and responsibilities being clearly identified and communicated to the other project participants and partners. In municipalities where the implementation of the demonstration project is guided by an Advisory Committee, this leading role could be assumed by members of that committee.

Step 2: Gathering Available Information and Data

The TG should first proceed with the compilation of available information on the project, using monitoring and reporting information available such as: project schedule and main activities completed, reports on progress achieved (including MPED monitoring forms), other reports on significant events having taken place, material from knowledge sharing activities, other data source from participating local governments. The gathering of information can involve focus group discussions with stakeholders beyond the TG itself. Step 2 should result in a brief overview (2-3 pages maximum) of the most relevant progress achieved, based on data collected.

¹A demonstration project is defined as «... an innovative, sustainable, replicable and relevant LED model or practice that promotes and fosters measurable socio-economic benefits/impacts within a selected community/region ».

²These guidelines are inspired by the principles and processes presented in the excellent toolkit developed by Action Aid: ‘Resource Pack on Systematization of Experiences’, Action Aid, 2008.

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Step 3: Deepening Understanding

This is the critical part of the learning exercise. On the basis of the information and data available, the TG is now ready to proceed with the design of a meeting (or a series of meetings) or a small workshop that will engage project stakeholders in sharing their understanding of the results achieved. We are presenting below a proposed program for a project learning workshop.

Proposed Program for a Half-Day Knowledge Systematization Workshop

- Opening: sharing the purpose of the workshop and how the results will be shared and with whom. The TG then shares the results of its initial data gathering work, starting with a brief presentation of the initial project objectives and planned milestones (main activities, etc.).
- Participants break into groups (max. 4 participants per sub-group) to discuss the following questions:
 - Do the results shared reflect your understanding of what the project has achieved and how these results were achieved? If not, what would you add to what has been presented?
 - What are the key factors that have enabled this project to achieve these results?
 - If there is variance between actual and expected results, participants should be asked to discuss what caused this variance.
 - What would you say is the most successful aspect of this project? What is the component that you think can be shared as a good practice?
- Each group is asked to share its answers to the four questions on a different flip chart paper. The members of the TG (who should facilitate the workshop) gather all answers to each question for all to see and analyze.
- The lead facilitator asks the groups to discuss the results: are there common answers amongst the various groups? Different ones?
- As the participants take a break, the facilitators identify two or three topics that emerge from the previous discussion as key learning areas.
- Discussion on key learning areas: in small groups, participants hold more in-depth discussions on the two or three learning areas identified by the facilitators: Why is it a key learning area? What can you learn from it to improve your own LED work? What are the conditions that will ensure the successful replication of your good practices?
- A plenary session is held to combine the results of the small group work. The workshop ends with participants providing suggestions on how lessons should be documented, and with what audience they should be shared.

Step 4: Organizing the Lessons Learned

The results of this process should be presented in a simple and short written format that can later be adapted to suit the preferences and information needs of relevant audiences. The table below presents a suggested table of content for this report.

TABLE OF CONTENT AND GUIDING QUESTIONS FOR SUMMARY REPORT ON PROJECT LEARNING

1. Project Description

- What is the project about? What is the situation or problem the project aimed to improve?
- What were the main project components, processes, activities and milestones?
- Who were the main implementation partners and what were their respective roles?
- Who were the stakeholders (women and men) of the project – including all those affected, positively or negatively by the initiative?

2. Results and Sustainability

Compare expected with actual results. The analysis of variance between expected and actual results will contribute to the Section 3 below on success factors.

Discuss the sustainability of the results from one or more of the following angles:

- Organizational: are the organizations involved in the project able to continue their involvement?
- Financial: is this initiative in a position to finance itself? If not, what are the solutions being pursued?
- Technical: will the technology/approach developed or adopted be sufficient to meet the future needs of the municipality? Are stakeholders capable of maintaining it?
- Social: is this initiative socially acceptable to the citizens (women and men) of this municipality?
- Crosscutting themes: how is the project meeting its goals of gender equality and environmental sustainability?

3. Success Factors

Identify the factors that had a) a positive impact and b) a negative impact on the project. These factors can be **internal** to the project (e.g. the expertise provided by Canadian volunteers or LG staff involved) or **external** (e.g. the adoption of a new policy framework by the national government or complementary actions by other donors).

4. Lessons and Good Practices

What did stakeholders learn from the experience that they think could be adapted to other contexts?

- What are some of the approaches/technologies/processes that can be considered good practices?
- What are the steps that were completed in developing this good practice? Focus should be on what other cities/local governments need to know in order to successfully replicate this good practice.
- What guidelines or principles should guide the successful replication of these good practices in other municipalities?

Annexes: Other sources of evidence supporting the content of the case study report like pictures, audio files, tools and materials.

Step 5: Sharing the results

The demonstration project partners should decide how they want to share the results of this process, with whom and through which processes and tools. The table below can help you think about this.

DISSEMINATION PLAN: AN OVERVIEW

AUDIENCE	USUALLY INTERESTED IN...	MOST APPROPRIATE FORMATS
Local Government Association	<ul style="list-style-type: none"> • Application of good practices by members. • Broad dissemination (up-scaling). 	<ul style="list-style-type: none"> • Inventory or library of good practices, preferably web-based. • Training materials and seminars, including short videos. • Short notes on specific themes. • Facilitated discussions at national events.
Elected Officials	<ul style="list-style-type: none"> • Legal frameworks. • Impacts on their constituents. • Decisions to support future initiatives. 	<ul style="list-style-type: none"> • Success stories from various angles (impact on individuals, city staff, etc.). • Short pieces on how elected officials can be a positive force for change (if there are emerging good practices on that topic).
Municipal Staff	<ul style="list-style-type: none"> • Linkages with municipality's strategic plan. • Performance monitoring. 	<ul style="list-style-type: none"> • Technical notes on processes, indicators and data analysis. • A network or community of practice to facilitate interactions between officials of the various municipalities.
Entrepreneurs	<ul style="list-style-type: none"> • Potential opportunities. • Access to resources for new projects. 	<ul style="list-style-type: none"> • Documents, short leaflets. • Meetings and other networking activities.
Civil Society Organizations	<ul style="list-style-type: none"> • Social, environmental impacts. • Equity and inclusion issues. 	<ul style="list-style-type: none"> • Briefing notes on how the projects can address social and environmental impacts.