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Enabling poor rural people
to overcome poverty

President's report on proposed grants under the global/regional grants window to non- CGIAR-supported international centres

Note to Executive Board representatives

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For: **Approval**

Contents

Abbreviations and acronyms	ii
Recommendation for approval	1
Part I – Introduction	1
Part II – Recommendation	3

Annexes

I.	Nacional Financiera, Trustee of the Trust Fund for Biodiversity: Programme to Strengthen Community-based Management in Support of the REDD+ Strategy in Mesoamerica (PROFORCO)	4
II.	Regional Programme for Rural Development Training (PROCASUR): Strengthening Knowledge-sharing on Innovative Solutions Using the Learning Routes Methodology in Asia and the Pacific	9
III.	Regional Programme for Rural Development Training (PROCASUR): Promoting Young People’s Entrepreneurship in Poor Rural Territories in Latin America and the Caribbean	15
IV.	Microfinance Information Exchange, Inc. (MIX): Improving Performance Monitoring and Effectiveness in Rural Finance	21
V.	Oxfam Novib: Community-led Value Chain Development for Gender Justice and Pro-Poor Wealth Creation	27

Abbreviations and acronyms

APMAS	Asian Project Management Support Programme
APR	Asia and the Pacific Division
CCRB	Biological Corridors and Resources Coordination Unit (Coordinación de Corredores y Recursos Biológicos)
CONABIO	National Commission for Knowledge and Use of Biodiversity (Comisión Nacional para el Conocimiento y Uso de la Biodiversidad)
CPM	country programme manager
CSO	civil society organization
FAO	Food and Agriculture Organization of the United Nations
GALS	Gender Action Learning System
LTG	local technical group
MIX	Microfinance Information Exchange, Inc.
M&E	monitoring and evaluation
MFI	microfinance institution
PROCASUR	Regional Programme for Rural Development Training
PROFORCO	Programme to Strengthen Community-based Management in Support of the REDD+ Strategy in Mesoamerica
REDD	Reduction of Emissions by Deforestation and Degradation
RIMS	Results and Impact Management System
VC	value chain
VCD	value chain development
WEMAN	Women's Empowerment Mainstreaming and Networking

Recommendation for approval

The Executive Board is invited to approve the recommendations for grants under the global/regional grants window to non-CGIAR-supported international centres as contained in paragraph 7.

President's report on proposed grants under the global/regional grants window to non-CGIAR-supported international centres

I submit the following report and recommendation on five proposed grants for agricultural research and training to non-Consultative Group on International Agricultural Research (CGIAR)-supported international centres in the amount of US\$6.8 million.

Part I – Introduction

1. This report recommends the provision of IFAD support to the research and training programmes of the following non-CGIAR-supported international centres: Nacional Financiera, Trustee of the Trust Fund for Biodiversity (*Nacional Financiera Fideicomiso Fondo para la Biodiversidad*);¹ Regional Programme for Rural Development Training (PROCASUR); Microfinance Information Exchange, Inc. (MIX); and Oxfam Novib.
2. The documents of the grants for approval by the Executive Board are contained in the annexes to this report:
 - (i) Nacional Financiera, Trustee of the Trust Fund for Biodiversity: Programme to Strengthen Community-based Management in Support of the REDD+ Strategy in Mesoamerica (PROFORCO);
 - (ii) Regional Programme for Rural Development Training (PROCASUR): Strengthening Knowledge-sharing on Innovative Solutions Using the Learning Routes Methodology in Asia and the Pacific;
 - (iii) Regional Programme for Rural Development Training (PROCASUR): Promoting Young People's Entrepreneurship in Poor Rural Territories in Latin America and the Caribbean;
 - (iv) Microfinance Information Exchange, Inc. (MIX): Improving Performance Monitoring and Effectiveness in Rural Finance;
 - (v) Oxfam Novib: Community-led Value Chain Development for Gender Justice and Pro-Poor Wealth Creation.
3. The objectives and content of these applied research programmes are in line with the evolving strategic objectives of IFAD and the Revised IFAD Policy for Grant Financing, which was approved by the Executive Board in December 2009.
4. The overarching strategic goal that drives the revised grant policy is to promote successful and/or innovative approaches, technologies and enabling policies and institutions that will support agricultural and rural development, empowering poor rural women and men in developing countries to achieve higher incomes and improved food security.

¹ Trustee of the National Commission for Knowledge and Use of Biodiversity (CONABIO).

5. The policy aims to achieve the following outputs: (a) innovative activities promoted and innovative technologies and approaches developed in support of IFAD's target group; (b) awareness, advocacy and policy dialogue on issues of importance to poor rural people promoted by, and on behalf of, this target group; (c) capacity of partner institutions strengthened to deliver a range of services in support of poor rural people; and (d) lesson-learning, knowledge management and dissemination of information on issues related to rural poverty reduction promoted among stakeholders within and across regions.
6. The proposed programmes support the goal and desired outputs of the revised grant policy:
 - (i) The Programme to Strengthen Community-based Management in Support of the REDD+ Strategy in Mesoamerica (PROFORCO) contributes directly to the IFAD Climate Change Strategy, particularly with regard to operations in which IFAD proposes to use key partnerships on the ground, such as community-based, farmers' and women's organizations, NGOs, and national and local public institutions, including agriculture ministries. Our aim will be to empower local communities and their institutions to participate in climate-change decision-making processes and to build their capacity to respond using their own and others' experience. Based on its growing in-country presence, IFAD will also engage in country-level climate and environmental coordination efforts, working closely with bilateral and multilateral donors, and taking advantage, where appropriate, of the capacity of partner organizations.
 - (ii) The programme for Strengthening Knowledge-sharing on Innovative Solutions Using the Learning Routes Methodology in Asia and the Pacific is fully in line with the goal and outputs of the revised IFAD grant policy, as it will strengthen the capacity of implementing partners and target communities, and improve their knowledge of best practices.
 - (iii) The programme for Promoting Young People's Entrepreneurship in Poor Rural Territories in Latin America and the Caribbean is in line with the goal and outputs of the revised IFAD grant policy, as it will promote innovative activities and approaches to further strengthen the Fund's commitment to rural youth. In addition, it will contribute to raising awareness and promoting advocacy and policy dialogue on issues of importance to this target group.
 - (iv) The proposal for Improving Performance Monitoring and Effectiveness in Rural Finance responds to policy outputs (a), (c) and (d). It emphasizes the promotion of innovative mechanisms to capture, share, understand and effectively respond to social and financial performance information from IFAD's partners in rural finance.
 - (v) The overall goal of the programme for Community-led Value Chain Development for Gender Justice and Pro-Poor Wealth Creation is to contribute to sustainable wealth creation and value chain upgrading in Nigeria, Rwanda and Uganda through the empowerment of women and men from the poorest and most vulnerable households and the establishment of equitable participatory processes for economic decision-making at all levels.

Part II – Recommendation

7. I recommend that the Executive Board approve the proposed grants in terms of the following resolutions:

RESOLVED: that the Fund, in order to finance, in part, the Programme to Strengthen Community-based Management in Support of the REDD+ Strategy in Mesoamerica (PROFORCO), shall make a grant not exceeding one million two hundred thousand United States dollars (US\$1,200,000) to the Nacional Financiera, Trustee of the Trust Fund for Biodiversity, for a two-year programme upon such terms and conditions as shall be substantially in accordance with the terms and conditions presented to the Executive Board herein.

FURTHER RESOLVED: that the Fund, in order to finance, in part, Strengthening Knowledge-sharing on Innovative Solutions Using the Learning Routes Methodology in Asia and the Pacific, shall make a grant of one million United States dollars (US\$1,000,000) to the Regional Programme for Rural Development Training (PROCASUR) for a four-year programme upon such terms and conditions as shall be substantially in accordance with the terms and conditions presented to the Executive Board herein.

FURTHER RESOLVED: that the Fund, in order to finance, in part, Promoting Young People's Entrepreneurship in Poor Rural Territories in Latin America and the Caribbean, shall make a grant not exceeding two million United States dollars (US\$2,000,000) to the Regional Programme for Rural Development Training (PROCASUR) for a four-year programme upon such terms and conditions as shall be substantially in accordance with the terms and conditions presented to the Executive Board herein.

FURTHER RESOLVED: that the Fund, in order to finance, in part, Improving Performance Monitoring and Effectiveness in Rural Finance, shall make a grant not exceeding one million two hundred thousand United States dollars (US\$1,200,000) to the Microfinance Information Exchange, Inc. (MIX) for a three-year programme upon such terms and conditions as shall be substantially in accordance with the terms and conditions presented to the Executive Board herein.

FURTHER RESOLVED: that the Fund, in order to finance, in part, Community-led Value Chain Development for Gender Justice and Pro-Poor Wealth Creation, shall make a grant not exceeding one million four hundred thousand United States dollars (US\$1,400,000) to Oxfam Novib for a three-year programme upon such terms and conditions as shall be substantially in accordance with the terms and conditions presented to the Executive Board herein.

Kanayo F. Nwanze
President

Nacional Financiera, Trustee of the Trust Fund for Biodiversity: Programme to Strengthen Community-based Management in Support of the REDD+ Strategy in Mesoamerica (PROFORCO)

I. Background

1. In Mexico, as in Central America, there is a divergence of rural policies, giving rise to a sectorized approach to land, and thus preventing government programmes from having a positive effect on the improvement of farm, livestock and forestry production or the social welfare of its poorest residents. This divergence of policies has become a factor in the functional fragmentation of territories and landscapes, leading to increased vulnerability to the effects of an ever-changing climate. The grant programme is aimed at selected regions with indigenous peoples and poor farmers in five Mexican states, and in indigenous territories of Guatemala and Panama, where the rural population – mostly indigenous peoples – shows the highest levels of economic and social lag and where the highest concentration of forest cover remains. These regions are also characterized by their biological wealth, indigenous peoples' vast ancestral knowledge of their natural resources and the presence of local technical groups (LTGs)¹ that, in conjunction with community organization and governance, are one of the main triggers of sustainable rural development.
2. The principal causes of deforestation in Mexico and Central America are the conversion of forest land due to urbanization and agriculture, uncontrolled logging, and the demand for timber to house growing populations and in particular to produce fuelwood. It is estimated that the population will continue growing, which translates into an increased demand for natural resources. This situation, together with the impacts of climate change, is creating important challenges in terms of governance and poverty reduction. Many countries have undertaken plans to conserve and replenish their forests in response to the deforestation rates. There is no doubt that Mexican and Central American forests play an important role in poverty reduction. Countries today also seek a lower deforestation rate to help bring down the level of carbon emissions caused by deforestation and forest degradation and to reduce their vulnerability to climate change by implementing adaptation and mitigation practices.

II. Rationale and relevance to IFAD

3. The alignment of policies is achieved by forging agreements between sectors (government and civil society), thus building common interests leading to a shared vision. In this case, the need to halt climate change through mitigation and adaptation should encourage sectors to reach a better institutional arrangement – and to create synergies to heighten performance without undermining the conservation of natural resources and the human rights of the people that live among and depend on them. This situation was already identified in the paper presented by Mexico at the COP 16 Climate Change Conference (Mexico's REDD+ Vision: Towards a National Strategy), constituting one of the strategic approaches to building a national REDD+ strategy in Mexico.² This strategic vision stresses that sustainable rural development is the best way to solidify REDD+ in Mexico, as only

¹ Technical advisors from civil society organizations, many of them from indigenous communities, have been working with their communities on enhancing their economic and environmental capacities in order to improve their livelihoods and the sustainable management of their landscape and natural resources.

² Reducing Emissions from Deforestation and Forest Degradation (REDD) is a set of steps designed to use market/financial incentives in order to reduce the emissions of greenhouse gases from deforestation and forest degradation. REDD+ also includes the possibility of offsetting emissions through sustainable forest management, conservation and increasing forest carbon stocks.

a comprehensive perspective of the national and local context will alleviate the pressures of deforestation and forest degradation, promoting management and conservation of woodlands and improving the quality of life of the communities.

4. In Central America, for the last three decades, IFAD has fostered programmes in collaboration with governments through loans and grants. Key programmes include rural development, technical assistance, research, market access, development of farm, fishery and forestry production systems, and other activities that create jobs and build capacities in the poorest and most vulnerable indigenous and rural communities. Currently, one of IFAD's priorities in the region is to foster climate-change adaptation strategies, given the region's high vulnerability to this phenomenon, which will affect the poorest rural and indigenous populations if current trends continue. The present grant programme will open new paths to collaboration and exchange among countries in the Mesoamerican region in order to address the climate change phenomenon and strengthen local capacities to advocate and influence global and national policies – and the corresponding projects and programmes – so that their best interests are acknowledged.
5. Moreover, in accordance with IFAD strategies, the programme has an important regional component that seeks to establish exchange and collaboration linkages between Mexico and Central America, in line with the Mesoamerican Environmental Sustainability Strategy. In 2011, various governmental, civil and social organizations met at the Mesoamerican Forum on Forests, Communities and REDD+ Experiences, agreeing to jointly develop a forum for Mesoamerican coordination on forests, communities and climate change. This group is an important benchmark for experience-sharing activities.

III. The proposed programme

6. The overall goal of the programme is to strengthen the management capacities of the predominately indigenous *ejidos* (communal farms) and communities in five southern Mexican states and in indigenous territories of Guatemala and Panama. It also seeks to establish a forum for dialogue among national, local or indigenous authorities with respect to farming and forestry policies in order to align the REDD+ and climate-change adaptation strategies of Mesoamerican countries and to share this learning in the Mesoamerican region. The programme's objectives are to:
 - (a) strengthen the management and organizational capacities of communities through technical assistance, experimentation and training;
 - (b) reach effective agreements among various government authorities to align and strengthen their policies and programmes for the reduction of emissions due to deforestation and degradation;
 - (c) strengthen the role of the technical offices to broaden their operating capacity in five states in southern Mexico and in Central America;
 - (d) strengthen the capacities of local and indigenous technical groups in Guatemala, Mexico and Panama to improve their skills in negotiating with federal and local government agencies and to increase their involvement in the communities; and
 - (e) generate and systematize learning and establish approaches for collaboration, training and the sharing of experiences throughout Mesoamerica (southern Mexico and Central American countries).
7. The target group consists of the *ejidos* and communities in selected regions with strong indigenous peoples' presence. Early actions have been proposed within each country's REDD+ and climate-change adaptation strategies. The beneficiaries of these actions will be residents of the *ejidos* and communities located in indigenous territories, who will receive support – through technical assistance, experimentation, training and resource management – in accessing various government programmes as part of a shared approach to sustainable rural development. In addition, exchange linkages and collaboration between Mexico and Central American countries working on these issues will also be created, including the sharing of experiences and knowledge.

8. The two-year programme will comprise three main components:
- Empowering communities by enhancing the capacities of indigenous peoples and campesino communities to face the challenges of climate change, with the support of local and indigenous technical groups;
 - Engaging in dialogue for sustainable rural development and political advocacy to ensure national and international government investment in extremely poor communities to reduce their vulnerability; and
 - Strengthening of learning and knowledge management through local, national and international exchange.

IV. Expected outputs and benefits

9. These are the following:
- Agreement with federal government agencies and local governments to implement the programme in proposed regions;
 - Agreement with communities in localized regions to participate in the programme;
 - Agreement with LTGs to join the programme;
 - Active participation by a set of communities in each programme region;
 - Lessons learned on how climate change mitigation and adaptation instruments may be used by poor rural people;
 - Learning systematized, enabling the transfer of learning among diverse actors (mainly indigenous peoples and poor farmers);
 - Collaboration agreements, linkage, training throughout Mesoamerica; and
 - Open dialogue between communities (indigenous peoples and poor farmers) and governments to establish good practices and policies.

V. Implementation arrangements

10. The programme will be implemented and directed by the Biological Corridors and Resources Coordination Unit (CCRB) of the National Commission for Knowledge and Use of Biodiversity (CONABIO), through its formal structure and with the support of an operational group³ to be engaged at the programme's expense. Agreement with federal and local government agencies will be handled by CCRB. The CCRB technical director will be directly responsible for maintaining the flow of information and resources to the support group, in addition to overseeing operations, and will work with the respective agencies to ensure that project resource flows are properly implemented in the diverse programme regions.
11. The sharing of experiences in the framework of the programme will go beyond Mexico, to establish communication and exchange with governments and communities in Central America. The International Union for Conservation of Nature (IUCN) has offered to work with the selected communities in Guatemala and Panama and to act as a bridge for dialogue, exchange and cooperation among Central American countries. IUCN's regional office for Mesoamerica will be strengthened to increase its operating capacity to implement the programme.
12. An advisory board will be established to provide strategic guidance to the programme and to support political dialogue. The programme will be supervised

³ Integrated by the National Forestry Commission (CONAFOR) for Mexico, National Forests Institute (INAB) and National Council for Protected Areas of Guatemala (CONAP) for Guatemala, and Panamerican National Environment Authority (ANAM) for Panama, and including the Indigenous Network of Guatemala and the Panamanian National Coordination of Indigenous Peoples (COONAPIP).

directly by IFAD, including procurement, audit and reporting. Financial and administrative services will be provided by the regular CCRB structure.

VI. Indicative programme costs and financing

13. The programme will be cofinanced by IFAD and CONABIO. CONABIO will bear the regular personnel expenses of CCRB and the regional offices. The total cost of the programme is US\$2,031,100. IFAD will contribute US\$1,200,000 (59 per cent of the total cost), while CONABIO will provide cofinancing of US\$831,100 (41 per cent of the total cost), as shown in the following chart:

Summary of budget and financing plan (Thousands of United States dollars)

<i>Number</i>	<i>Type of expenditure</i>	<i>IFAD</i>	<i>Cofinancing</i>
1	Professional services/consultancies ^a	327	470
2	Travel costs	110	43
3	Equipment	119.7	68
4	Operational costs, reporting and publications	18.3	68.5
5	Training/capacity-building ^b	601	15
6	Administrative costs/overhead ^c	24	166.6
	Total	1 200	831.1

^a Cofinancing includes the cost of CONABIO's regular staff supporting the programme.

^b Includes the cost of training, workshops, exchange and most activities related to knowledge management.

^c Overhead is included in CONABIO's cofinancing.

Results-based logical framework

	Objectives-hierarchy	Objectively verifiable indicators	Means of verification	Assumptions
Goal	To strengthen the management capacities of communal farms (ejidos) and communities with preponderant indigenous peoples in five southern Mexican states and in indigenous territories of Guatemala and Panama, and also establish a forum for dialogue among national, local or indigenous authorities with respect to farming and forestry policies to align Mesoamerican countries REDD+ and climate change adaptation strategies, and share this learning in the Mesoamerican region.	<ul style="list-style-type: none"> Number of communities in the process of self-managing their territories. Number of policies and programmes aligned with REDD+ and climatic change adaptation strategies. Number of technologies experimented on projects. Number of exchange meetings between Mesoamerican countries. 	<p>Annual and final M&E report</p> <p>Collaboration and coordination agreements</p> <p>Annual programme reports</p> <p>Meeting reports</p>	Communities are interested in participating in the programme and have adequate assistance and training. The local governments involved have the political will to carry out the programme, despite the upcoming 2012 elections in Mexico. Central American countries have common interests and are interested in sharing experiences and training.
Objectives	<u>Component 1 Empowering communities</u> Strengthen management and organizational capacities of communities through technical assistance, experimentation and training.	<ul style="list-style-type: none"> Number of communities actively involved in the programme and receiving technical assistance and training. Number of communities where training courses and workshops are held. Elements providing greater governance to communities. Number of meetings and agreements between government and local indigenous authorities. 	Annual M&E report	<p>Communities show interest in participating in the programme and working to increase their social capital and governance.</p> <p>Government authorities see this proposal as key to ensure the free prior and informed consent' (FPIC)</p>
Outputs	<u>Component 2 Dialogue for sustainable rural development</u> Reach effective agreements among various government authorities to align and strengthen their policies and programmes for the reduction of emissions due to deforestation and degradation and strengthen the role of the Technical Offices to broaden their operating capacities in 5 states in south-southeast Mexico and Central America.	<ul style="list-style-type: none"> Number of inter institutional agreements involving programmes, budgets and shared goals. Number of regional offices with the technical and operating capacity to handle the programme. Number of coordination agreements among government agencies. Number of LTGs involved in the programme. Number of participating communities. 	<p>Signed coordination agreements</p> <p>Annual programme report</p>	Political will of all actors taking part in the sustainable rural development strategy.
Key Activities	<u>Component 3. Learning and Knowledge Management</u> Strengthen the capacities of local indigenous and campesino (farmer) technical groups in Mexico, Guatemala and Panama to improve their negotiation skills with federal and local government agencies and increase their involvement in communities and generate and systematize learning and establish approaches for collaborating, training and sharing experiences throughout Mesoamerica (southern Mexico and Central American countries).	<ul style="list-style-type: none"> Number of trained technical groups with the operating capacity to handle the respective regions' demands. Number of strategies and mechanisms tested by rural communities. Number of strategies enabling rural residents' access to climate change mitigation and adaptation instruments. Number of exchange actions throughout Central America. Joint exchange initiatives among countries in the region. 	Annual programme report	Will of actors to test strategies to access climate change instruments.

Regional Programme for Rural Development Training (PROCASUR): Strengthening Knowledge-sharing on Innovative Solutions Using the Learning Routes Methodology in Asia and the Pacific

I. Background

1. The programme takes into account the grant strategy of the Asia and the Pacific Division (APR), IFAD's Revised Policy for Grant Financing of December 2009 and its South-South cooperation approach. It aims to support innovations that reduce the risks and vulnerability of poor rural men and women, and strengthen institutions and policies that promote their interests and management systems, while increasing the productivity and sustainability of smallholder agriculture. Specifically, the programme will support a demand-driven approach focused on broad-based direct exchanges of "know-how" using the flagship methodology of learning routes, and it aims to accelerate this tested approach across regions.¹
2. The programme will be fully integrated with APR efforts to strengthen knowledge management and learning capacity at project and country levels. More specifically, it will be linked to the Asian Project Management Support Programme (APMAS), which aims to enhance the capacity of higher-level implementing agency staff and national organizations to understand and value the benefits of improving the management of development projects, while promoting a knowledge and evaluation culture. It will also be linked to the IFAD/Food and Agriculture Organization of the United Nations (FAO) Programme for the Development of Knowledge-sharing Skills.²

II. Rationale and relevance to IFAD

3. The programme addresses current shortcomings of knowledge management initiatives by IFAD and within the Asia and the Pacific region. Its rationale centres on the need for greater knowledge and further adoption of process and institutional approaches that contribute towards meeting poverty reduction objectives. Moreover, it recognizes the need to document best practices focused on processes and outcomes, enabling others to learn how projects can be successfully implemented. The programme identifies and consolidates existing grass-roots information and knowledge networks, including informal learning and the support of community advisers. It will provide training and user support for appropriate, robust, low-cost information-sharing.

III. The proposed programme

4. The overall goal of the programme is to increase knowledge and capacity for adopting and scaling up best practices and innovations for poverty reduction among IFAD stakeholders in the Asia and Pacific region.
5. The programme's objectives are to:
 - Build human capital – within rural communities, small farmers' organizations, and the technical staff of rural development projects, programmes and grants and of implementing institutions – by identifying, systematizing and disseminating existing knowledge on innovation and best practices;

¹ The "learning route" is a methodology developed by PROCASUR consisting in a journey of field-based training in which participants learn from concrete projects, from each other and from a wider range of partners.

² EB 2009/98/R.47.

- Scale up and adopt the best available solutions for confronting rural poverty and development constraints by increasing the effectiveness of interventions and assisting national stakeholders in adapting and replicating the learning routes methodology and approaches; and
 - Improve the results and impact of programmes and projects.
6. Programme activities will emphasize the full participation of rural women, indigenous peoples, young people and their organizations, using appropriate channels to deliver information directly to their organizations and networks and considering affirmative action during the participant selection process. The target group is composed of: (a) organizations of poor rural people involved in the implementation of development programmes in the region; (b) project staff and development professionals from NGOs, other implementing agencies and programmes funded by other donors; (c) central and local government officials and policymakers; and (d) research and educational institutions focused on rural poverty reduction.
7. The programme will comprise three main components: (i) stocktaking of relevant knowledge and interests; (ii) design and implementation of learning routes; and (iii) knowledge dissemination and methodological adoption.

(i) Stocktaking of relevant knowledge and interests includes:

(a) Identifying three to five main thematic areas of interest in conjunction with regional knowledge networks and projects funded by IFAD and other agencies. This involves the preparation of thematic maps, online surveys, consultations with country programme managers (CPM) and field visits to ensure that what will be learned will have value for participants and will support strategic objectives in the Asia and Pacific region.

(b) Mapping tried innovations, best practices and identifying local champions. This involves preparation of a comprehensive inventory of successful interventions, including the identification of local champions who have played a significant role in furthering innovation and in expanding the use of best practices in the context of poverty reduction efforts.

(c) Enabling local champions. The programme will also enable local champions and knowledgeable practitioners to organize their experience and identify major lessons learned and recommendations using a Web platform.

(ii) Design and implementation of learning routes involves open calls for participation in distinct learning routes as a response to specific demands by aggregated groups of projects. It is expected that the routes will take place mainly within the Asia and Pacific region, but also in other regions. Participants will prepare an innovation plan in which replicable solutions are developed. All plans will be screened and awards given to the best ones. The plans will be judged on the merits of each proposal and the likelihood of its being implemented.

(iii) Knowledge dissemination and methodological adoption involves the sharing of in-house and field information, especially with existing regional grants in the region. Wider dissemination efforts will include the use of electronic media and the production of printed and audiovisual materials. The programme will provide advisory services on incorporating the learning routes methodology in future IFAD-funded operations in the region, while supporting knowledge transfer to local and/or national governmental and non-governmental organizations. Upon completion of the programme, and

following comprehensive training, it is expected that organizations will continue to be linked to the existing network of learning-route service providers. This includes the design of a monitoring and evaluation system based on indicators and evaluation parameters from APR's other two regional learning routes programmes and on IFAD procedures – more specifically, the Monitoring and Evaluation Tool Kit developed by APR.

IV. Expected outputs and benefits

8. The expected outputs and benefits associated with each of the three programme components are the following:
 - (i) Stocktaking of relevant knowledge and interests**
 - Comprehensive report on relevant thematic areas of interest;
 - Catalogue including descriptions, methodologies and approaches of up to 50 tested best practices and innovative solutions;
 - Directory of national and local organizations, including their experiences and capacities to transfer and share their innovative experiences, lessons and recommendations;
 - Up to 900 local champions identified and trained, enabling them to in turn provide training and technical assistance services; and
 - Regional online maps of successful innovations and champions.
 - (ii) Design and implementation of learning routes**
 - 18 learning routes (16 within the region and two in other regions), totalling 250 effective training days, 360 direct beneficiaries and at least 3,600 indirect beneficiaries;
 - 360 innovation plans developed by route participants; and
 - Financing for implementation of 40 innovation plans, 15 of them to be cofinanced by the participant's organization and/or a third partner, such as other development projects and programmes funded by bilateral and/or multilateral agencies.
 - (iii) Knowledge dissemination and methodological adoption**
 - Operational manual on learning routes implementation;
 - Monitoring and evaluation system;
 - 15 printed and/or audiovisual materials documenting results and programme impact;
 - Training and technical assistance to three projects/programmes for adoption of the learning route methodology;
 - Recognition of at least three local or national governmental or non-governmental organizations as learning-route service providers; and
 - Online programme platform using a Web 2.0 approach.
9. Through implementation of the methodology, participants and their organizations will be able to identify what is working in the development field and to assess the merits and possibilities of scaling up these solutions by adapting them to their local conditions. Upon completion of the programme, the methodology will have been internalized by national and local organizations and projects and will be replicated with regional or national funding sources.

V. Implementation arrangements

10. The recipient of the grant will be PROCASUR, a not-for-profit organization registered in Chile and accredited in the Plurinational State of Bolivia and Kenya. PROCASUR will contract a programme facilitator to be based in one of the APR countries, to be decided at programme start-up. The facilitator will be appointed to IFAD's satisfaction and will work in close collaboration with APMAS and the Programme for the Development of Knowledge-sharing Skills. S/he will coordinate all activities in close collaboration with CPMs, country programme officers (CPOs) and project and knowledge managers in the selected countries. A total of 16 learning routes will be undertaken. During the last two years, the programme will emphasize inclusion of the methodology in new operations and will provide training to organizations to assist them in accessing learning routes services. During this period, impact will be assessed and the long-run sustainability of the methodology will be addressed.
11. In order to provide overall guidance to the implementation of programme activities, a programme steering committee (PSC) will be established. It will meet once a year and will be composed of: (a) two representatives of IFAD-funded projects in the Asia and Pacific region, (b) an APR CPM will chair the PSC, and (c) the programme facilitator will act as secretary to the PSC. The use of video conferencing will be considered, so as to reduce travel costs. The programme will be regularly and directly supervised by IFAD, including procurement, audit and other reporting.
12. Programme evaluation includes: (a) evaluation conducted as part of the learning route; and (b) mid-term and completion evaluations. The programme's exit strategy will be ensured by activities aimed at transferring the methodology to regional/national organizations that may assume ownership of the approach and continue its implementation.
 - (a) **Evaluation as part of the learning route.** Upon completion of a route, a reflection group composed of participants, hosts and facilitators will determine if objectives and expectations were met. The evaluation of the innovation plan is also considered in order to assess ownership and adoption of the knowledge acquired.
 - (b) **Mid-term and completion evaluations.** A mid-term assessment will be carried out as part of direct supervision. This evaluation will be of paramount importance in moving the programme forward to full implementation. Upon programme completion, an evaluation will be conducted to verify and assess: (i) achievement of expected results; (ii) evidence of impact on the working practices of individuals and organizations that participated in the programme; (iii) impact on organizations and their members participating as service providers on routes implemented by the programme; (iv) validity of lessons and recommendations on strategies and modalities for implementation of learning routes; and (v) scaling up of the learning routes methodology in the APR.

VI. Indicative programme costs and financing

13. Total programme costs have been estimated at US\$2.4 million, with a contribution of US\$1.0 million from IFAD and US\$400,000 provided by PROCASUR and programme participants. Subject to the approval of IFAD's programme of work, it is anticipated that the originating division intends to process a second grant of US\$1.0 million to provide additional financing to the programme in 2012. The disbursement of the overall financing will be effected in accordance with the annual programme of work and budget and will be subject to a triggering mechanism, including: (a) meeting milestone targets; (b) acceptance of the approach and methodology by at least 10 projects and programmes; and (c) recognition of the competency of at least 10 national and/or regional organizations.

Summary of budget and financing plan
(Thousands of United States dollars)

<i>Number</i>	<i>Type of expenditure</i>	<i>IFAD</i>	<i>Cofinancing^a</i>
1	Personnel (including subcontractors)	130.00	130.00
2	Professional services/consultancies	68.21	83.39
3	Operational costs, reporting and publications	166.70	208.70
4	Training/capacity-building	635.09	977.91
	Total	1 000.00	1 400.00

^a Total programme financing is US\$2.4 million. For presentation purposes, the US\$1.0 million IFAD contribution foreseen for 2012 has been included, for now, under the cofinancing total.

Results-based logical framework

	Objectives-hierarchy	Objectively verifiable indicators	Means of verification	Assumptions
Goal	Increase knowledge and capacity for adopting and scaling up best practices and innovations for poverty reduction among IFAD stakeholders in the APR region.	Improved wellbeing and reduced poverty conditions in programme and project areas in selected countries.	Project supervision missions; Mid Term reviews; Portfolio Review; RIDE and ARRI reports.	
Objectives	i) Build human capital of rural communities and project and programme implementers; ii) Further scaling up of the best available solutions thus increasing the effectiveness of development projects; iii) Improve programme and project results and impact.	10 projects adopting and or adapting innovative solutions for poverty reduction. 10 projects rated satisfactory or above in terms of relevance and knowledge management.	Project supervision missions Mid Term reviews, Portfolio Review, RIDE and ARRI reports.	Existence of replicable sound innovations and spaces for scaling up; Evaluations of development interventions show significant contributions by programmes and projects in struggle against rural poverty conditions.
Outputs				
Result 1	(a) Three to five main thematic areas of interest identified, in conjunction with regional knowledge networks and projects funded by IFAD and other agencies. (b) Tried innovations and best practices mapped out; (c) local champions identified and enabled.	3 to 5 scoping paper published; 50 innovative experiences identified, systematized and published; 900 local champions trained to provide training using the Learning Routes methodology; one directory and map of national and local organizations set on-line	Compendium of innovative solutions, Programme reports, Training reports	Existence of replicable sound innovations and spaces for scaling up
Result 2	IFAD funded projects staff, partners and beneficiaries answer their knowledge management and capacity building demands through in the field training and the design and further implementation of a plan for innovation.	18 Learning Routes with 250 training days; 360 of participants where women, indigenous and youth represent the 50%; 3600 others indirectly benefiting from the dissemination and innovation plan, 40 Innovation Plans designed, and funded and implemented	Learning Routes convocations and list of applicants; Design and end-of-route reports; Innovation Plans and assessments for awards	Favourable macro and micro economic conditions for up scaling innovations; Innovations to be introduced are politically, socially and culturally accepted
Result 3	Learning Routes approach and methodology adopted by national and local organizations through training and technical assistance	Implementation manual published; 3 IFAD funded projects trained and assisted in the adoption of the methodology; 15 communicational products disseminated; 3 national organizations recognized as training providers; M&E plans and analytical assessments; On-line Platform	Training reports; projects and organizations annual reports; Website statistics; Readership; Viewer surveys and AV materials; Monitoring and evaluation reports	National authorities, project and programme staffs willing to share information for monitoring and evaluation purposes; Accessibility to Internet services and efficient distribution systems for printed material
Key Activities	(1) Knowledge audits, harvesting and dissemination, (2) Information processing and dissemination, (3) Design and implementation of Learning Routes, (4) Methodological adoption	Means: consulting services, training, publications and audio visual materials, staff salaries and operational costs	Annual Work Plans and Budgets; Programme supervision reports	Grant agreement signed; Programme launched; Staff contracted and deployed; First Annual Work Plan & Budget (AWPB) prepared and approved by IFAD

Regional Programme for Rural Development Training (PROCASUR): Promoting Young People's Entrepreneurship in Poor Rural Territories in Latin America and the Caribbean

I. Background

1. A recent study by the Food and Agriculture Organization of the United Nations (FAO) indicates that rural youth account for some 55 percent of the world youth population. They are among the most disadvantaged of groups, with limited access to educational programmes geared to their situations and needs. Rural young women have even greater difficulties than young men, as they are often not given the same opportunities in education, training and involvement in rural development activities. The report concludes that rural youth must be supported in:
(a) improving their capabilities to produce food and to conserve productive resources in the rural environment; (b) improving their skills and abilities to conduct income-generating activities in rural areas; (c) relieving population pressure and improving nutrition and the well-being of farm families; and (d) developing leadership and the ability to work well with others in group and community situations. Their knowledge, skills, attitudes and behaviour are of vital importance in the implementation of sustainable agricultural and rural development programmes.
2. In Latin America the issue has come to the forefront in recent months. An international workshop on Youth: Development Actors in Rural Areas, held in Bogotá, Colombia, in October 2010, provided an opportunity to assemble leaders of youth organizations, governmental institutions and multinational bodies from 14 countries – demonstrating the relevance of the topic to the region. International organizations operating in rural areas in Latin America and organizations related to agricultural activities, such as FAO, the Inter-American Development Bank, the Inter-American Institute for Cooperation on Agriculture and IFAD, became aware of the need to design specific programmes in favour of rural youth, integrating them into the region's development agenda. Moreover, in November 2010, an international workshop held in Cartagena, Colombia, organized by IFAD, gathered nearly 70 rural young entrepreneurs, mainly from Latin America and Africa, to learn about and analyse main opportunities and constraints in their territories. Both events confirmed and deepened the situational diagnosis of problems, and the potential for greater integration of rural youth into development endeavours. The consultations also determined the existence of a knowledge gap among organizations and institutions, in terms of the participation and involvement of rural youth in development. Participants reaffirmed their conviction that working with rural young people was of strategic importance in the struggle against rural poverty when considering economic, social and demographic issues.

II. Rationale and relevance to IFAD

3. Systematic work and investments in favour of rural youth are priorities if the capacity of inhabitants of poor rural territories to improve their living conditions is to be strengthened. Latin America's rural young people have to be considered active participants in any rural development strategy aimed at furthering development of human and social capital. They must be viewed as a strategic segment, with capacities and possibilities to contribute to improving conditions in the rural milieu. Rural young people suffer from both exclusion and poverty, alarming in some countries. However, assisting them in shaping a strategic vision for the development of their communities, and improving their access and control over

assets, will enable them to act as catalysts of their local, national, regional and global economies.

4. Agreements reached at the IFAD Governing Council session in February 2011 recommended supporting initiatives in favour of rural youth for the following reasons: (i) any intervention in this regard will reduce risks to rural societies by allowing young populations to build their livelihood strategies and plans based on the potential and assets of their own territories, communities and families; (ii) investing in rural young men and women, taking into consideration their diversity, will add up to greater growth of rural economies and agricultural and non-agricultural activities; and (iii) in order to encourage the permanence of young populations in rural territories, it is necessary to stimulate income generation through entrepreneurship or employment, and through the accumulation of physical assets.

III. The proposed programme

5. The overall goal of the programme is to contribute towards poverty reduction among rural youth by improving the capacity of IFAD-funded operations to increase their access to development initiatives that are relevant to their livelihood strategies.
6. The programme's specific objectives are to: (a) generate and disseminate information and updated knowledge on the situations of rural youth in selected countries and territories, with emphasis on understanding and learning from their own livelihood strategies, demands and aspirations; (b) further policy dialogue in favour of the interests of rural youth and streamline the Fund's current instruments in the rural development context; and (c) identify and cofinance innovative microenterprises by rural youth, with at least 50 per cent of the resources to be invested in initiatives headed by young women, and generate useful lessons and learning to enhance their roles in their territories.
7. The target group is composed of rural youth who participate in the implementation both of ongoing IFAD-funded projects and of those that will become effective in poor rural areas of Brazil, Colombia, the Dominican Republic, Guatemala and Peru. Approximately 270,000 rural households are direct beneficiaries of these operations. According to estimates made during appraisal, the projects will target an estimated 68,000 young people, equivalent to 25 per cent of the total number of beneficiary households.
8. It is expected that the programme will actively involve 5,000 young women and men that are part of rural households actually benefiting from IFAD investments; with an estimated 800 youth directly benefiting from financial resources to strengthen and accompany their innovations. An additional 250 technicians and professionals from project implementing units, private institutions and farmers' associations will benefit from the grant interventions. Finally, the programme will consider the inclusion of no less than 150 specialists, national policymakers and representatives of relevant sector institutions, who will be involved in efforts geared towards the design and formulation of inclusive policies for rural youth.
9. The four-year programme will comprise three main components:
 - **Component 1: Knowledge management.** The main objective of this component is to enhance existing knowledge assets in the programme area by identifying, recording, capturing and disseminating best practices and solutions that are relevant and functional to the livelihoods of rural young women and men. These lessons, learning and recommendations may then be replicated and scaled up through IFAD-funded operations and those of other development agencies. Main activities of this component include:
 - (a) **thematic systematization** aimed at capturing best experiences of inclusion and participation of rural youth, choosing the relevant lessons and

experiences around topics regularly included in the Fund's operations; **(b) specific studies** providing information and knowledge on population dynamics and on the social and economic characteristics of young rural women and men in the targeted countries. These studies will include a detailed description of the main livelihood strategies of rural youth, an analysis of the most important public policy initiatives for young rural people, and concrete recommendations to improve the inclusion of rural youth in investment policies; **(c) establishment of a regional thematic network** to enhance partnerships and exchange of experiences among rural youth, both in the targeted territories and in other IFAD operations in the region. The regional network will also allow the effective promotion of policy dialogue through information-sharing and modern communication technologies; **(d) organization of national and international workshops** to analyse the status of inclusion and progress of and obstacles to rural youth in current rural development initiatives, as well as to mobilize young leaders in the promotion of these issues; and **(e) publication and dissemination of information and knowledge** (written and audiovisual materials) and strengthening of the regional youth network on the Internet.

- **Component 2: Advocacy and policy dialogue.** The objective of this component is to remove barriers that prevent the full participation of rural youth in policy initiatives for poor rural people, providing opportunities for reflection and dialogue. The activities will allow rural young women and men to meet with policymakers and other stakeholders (national authorities, donors, etc.), and to influence the elaboration of youth-sensitive public policy. Under this component, the programme will also fund design, analysis, tools and recommendations for promoting the inclusion of rural youth in IFAD's investment cycle, especially in the country strategic opportunities programme (COSOP) design and appraisal phases. Main activities include: **(a) mapping of institutional actors and opportunities** relevant to the inclusion of young people in both on- and off-farm initiatives in rural territories; **(b) organization of national policy dialogue workshops** in the targeted countries and territories; **(c) systematization for innovation** in order to advocate for issues relevant to rural youth at the policy level and in the programme cycle; and **(d) methodological workshops** to present, discuss and agree on conceptual and methodological recommendations for improving the inclusion of rural youth in the formulation, implementation and follow-up of IFAD's operations in Latin America and the Caribbean.
- **Component 3: Learning and scaling up of innovations.** The objective of this component is to establish a learning investment fund to encourage IFAD-funded projects, and those of other national and international institutions, to make direct investments in rural youth. The resources will be provided on a grant basis and will be primarily directed at cofinancing – with associated projects – of innovative agricultural and non-agricultural business initiatives headed by rural youth. At least 50 per cent of the direct beneficiaries of the fund must be young women. In addition, the fund will enable systematization of efforts and the drawing of lessons from best practices to be included in current and forthcoming IFAD operations in the region.

IV. Expected outputs and benefits

10. Programme outputs include: 5 research papers, a typology of rural young people, 50 systematizations of innovative initiatives by rural youth, 10 national analytical workshops, 2 international knowledge-sharing workshops, a regional network of young rural talent, 5 institutional maps, 10 national policy-dialogue workshops, 6 conceptual and methodological notes, 3 methodological appropriation workshops,

funding of 50 innovative initiatives by rural youth, and 25 publications and audiovisual products.

11. The following benefits will accrue from programme implementation: (a) increased participation by rural young women and men in national policy dialogue; (b) better information on and knowledge of the situations of youth in rural territories; (c) adoption of relevant strategies and methodologies for increasing access by rural youth to land, technical and financial services and entrepreneurial development; (d) increased public- and private-sector investments benefiting rural youth; (e) increased knowledge of best strategies, methods and modalities for promoting a gender-sensitive inclusion of rural youth in development initiatives; and (f) reinforced capacity of rural youth to capitalize on their learning and highlight their relevancy in future rural development strategies.

V. Implementation arrangements

12. The programme will be implemented by PROCASUR based on an annual work plan and budget (AWP/B). The geographical focus includes at least five countries in Latin America and the Caribbean – Brazil, Colombia, the Dominican Republic, Guatemala and Peru – directly involving a minimum of five IFAD-cofinanced projects. Collaborative agreements will be constituted with interested IFAD-funded projects to ensure the active participation of technical teams, executing agencies and relevant national authorities. In each participating country, the programme will establish a technical advisory body composed of representatives of youth associations, the director of the partner or associated project, and a representative of the executing agency.
13. The programme will have a duration of four years from its date of effectiveness. PROCASUR will be responsible for implementation, and will establish a regional technical unit at its headquarters, responsible for planning, implementation, monitoring and evaluation of both activities and results. This unit will include a coordinator and technical assistant, in addition to administrative and financial support personnel. Moreover, the programme will establish a regional council, composed of the Latin America and the Caribbean division (LAC) senior rural development specialist, CPMs of the countries involved directly in the programme, a project director from among those participating, two representatives of rural youth associations (one of them a woman), and a PROCASUR representative. The regional council will meet annually to approve the AWP/B, and to assess and provide advice on technical aspects related to programme activities and results.
14. The programme will be supervised directly by IFAD, and procurement, audit and other reporting arrangements will follow the normal requirements for large grants. The senior rural development specialist in IFAD's LAC division will bear ultimate responsibility for supervision, supported by the country programme managers whose countries and projects are directly involved.

VI. Indicative programme costs and financing

15. The programme will be funded by IFAD for a total of US\$2,000,000, representing 60 per cent of the total cost, by PROCASUR US\$96,375 (3.5 per cent), and by programme participants US\$1,203,625 (36.5 per cent). Participants include primarily IFAD projects in the region, national governments and other international agencies. Previously, other programmes for rural youth implemented by PROCASUR have been able to attract considerable cofinancing from IFAD-funded projects, the Ford Foundation and FAO, among others. Administrative costs (i.e. costs related to programme management, but not attributable directly to the present grant programme) are included in operational costs and will not exceed 10 per cent of total programme costs.

Summary of budget and financing plan
(Thousands of United States dollars)

<i>Number</i>	<i>Type of expenditure</i>	<i>IFAD</i>	<i>Cofinancing</i>
1	Personnel (including subcontractors)	351.00	13.00
2	Professional services/consultancies	309.15	88.25
3	Operational costs, reporting and publications	331.85	213.75
4	Training/capacity-building	595.50	585.00
5	Incentives for innovation	412.50	400.00
	Total	2 000.00	1 300.00

Results-based logical framework

	Objectives-hierarchy	Objectively verifiable indicators	Means of verification	Assumptions
Goal	Contribute towards poverty reduction among rural youth by improving the capacity of IFAD-funded operations to increase access by rural youth to rural development initiatives that are relevant to their livelihood strategies	Reduction in poverty and malnutrition in rural areas, within areas of associated projects	National living standards measurement surveys and project RIMS reports	
Objectives	(a) Generate and disseminate information and updated knowledge on the situation of rural youth in selected countries and territories, with emphasis on understanding and learning from their own livelihood strategies, demands and aspirations, (b) Further policy dialogue in favour of the interests of rural youths and streamline the Fund's instruments currently used in the rural development context; (c) Identify and cofinance innovative micro enterprises by rural youth, with at least 50% of the resources to be invested in initiatives headed by young women, and generate useful lessons and learning to enhance their role in their territories.	# of associated partner projects, # of relevant recommendations for furthering inclusion of rural youths in rural development interventions, # of newly designed projects which include youth targeting approaches, # of innovative business ventures that are successful and profitable	Annual progress reports Mid-term and end-of programme evaluation Proposed projects appraisal documents Business registrations	Borrowing countries willing to consider rural youths as targets for development assistance National public investment bureaucracies interested and willing to address the needs of rural youths
Outputs	(a) Increased participation by rural young women and men in national policy dialogues, (b) Better information and knowledge on the situation of youths in rural territories; (c) Adoption of relevant strategies and methodologies for increasing access by rural youth to land, technical and financial services and entrepreneurial development; (d) Increased public and private sector investments benefiting rural youths, (e) Increased knowledge on best strategies, methods and modalities for promoting a gender-sensitive inclusion of rural youths in development initiatives; and (f) Reinforced capacity of rural youth to capitalize on their learning and highlight their relevancy in future rural development strategies.	5 research papers, a typology of rural youths, 50 systematizations of innovative initiatives by rural youths, 10 national analytical workshops; 2 international knowledge sharing workshops, a regional network of young rural talents, 5 institutional maps, 10 national policy dialogue workshops, 6 conceptual and methodological notes, 3 methodological appropriation workshops, 50 innovative initiatives by rural youths funded, 25 publications and audiovisual materials	Annual progress reports Summary records of workshops and consultations	National authorities willing to share information and actively participate in policy dialogues
Key Activities	Systematizing existing knowledge; defining typologies of rural youths; stakeholder mapping exercises; organization of workshops for national and international-level policy dialogue; establishment of a regional thematic network; preparing conceptual and methodological notes and guidelines; provision of funding for rural youth's innovative entrepreneurial initiatives.	# of participants in workshops # of consultations using the thematic virtual network # of business ventures registered	Programme AWPB Implementation progress reports Business registrations and annual financial statements	Verifiable indicators and reliable statistics on rural youth population Favourable business climate for investments

Microfinance Information Exchange, Inc. (MIX): Improving Performance Monitoring and Effectiveness in Rural Finance

I. Background

1. Considering the varied causes of rural poverty, the lack of access to financial services represents a major hindrance in improving the socio-economic choices of poor rural people. Building inclusive financial systems that serve poor people in rural areas is a priority for IFAD, as demonstrated by the fact that approximately 20 per cent of the Fund's portfolio is dedicated to rural finance initiatives. Whether working with commercial banks to design products for poor clients, with participatory models on issues of governance, or with microfinance institutions (MFIs) to build staff capacity, in each of its interventions IFAD is committed to understanding and supporting improvements in the performance of its rural finance partners.
2. As the first donor to partner with the Microfinance Information Exchange, Inc. (MIX), IFAD is at the forefront of donor harmonization of standard performance indicators in microfinance. It promotes effective performance monitoring and greater transparency in the microfinance sector in order to strengthen institutions and increase competition, which leads to better financial products at better prices for poor rural people, IFAD's target group.
3. MIX focuses on one of the key challenges in development finance: the lack of reliable, publicly available information on the financial strength and operational and social performance of MFIs. This critical information is fundamental to the maturation of the financial market for microfinance services. Addressing this gap, MIX works to build the infrastructure of the microfinance sector by offering specialized information services and data sourcing, benchmarking and monitoring tools.
4. The existing collaboration between IFAD and MIX has already contributed significantly to the goal of increasing the transparency of information on microfinance markets and microfinance service providers. It has expanded the scope and frequency of MFI data availability, added new information relevant to understanding the markets, and enabled users to consult that information through MIX's online information portal, the MIX Market.¹ With a focus on financial service providers in rural areas, the proposed programme reflects the strategic priorities of both organizations.

II. Rationale and relevance to IFAD

5. IFAD's commitment to monitoring the performance of its rural finance interventions is driven by the recognition that effective performance monitoring and greater transparency in rural finance and microfinance generate stronger institutions and increased competition in the sector, which in turn result in better financial products for poor rural people. IFAD has taken several steps to internally highlight the importance of performance reporting and monitoring. The recently revised *IFAD Decision Tools for Rural Finance* contains a list of core performance indicators, with explanations of each indicator and guidance on how to calculate and use them.² These indicators are aligned with IFAD's Results and Impact Management System (RIMS). As highlighted by the SmartAid exercise conducted in 2009, there is a need to strengthen IFAD's systematic tracking and reporting of performance indicators.

¹ www.mixmarket.org/.

² www.ifad.org/ruralfinance/dt/index.htm.

6. IFAD's partnership with MIX constitutes a tangible effort to build the capacity of project staff, creating incentives for partners to report and promoting the transparency of the industry at large. As this important initiative continues into its next phase, it builds on the results of the collaboration to date, including better selection and alignment of key performance indicators in IFAD project designs and greater understanding of these indicators and how to interpret them on the part of IFAD staff, both in the field and at headquarters. Looking towards the future, working closely with MIX will also allow IFAD to directly address the recommendations of the SmartAid review and to enhance its capacity to monitor the performance of its rural finance programmes, encouraging the ongoing transition from activity- to performance-based monitoring. Specifically, this partnership will improve the scope of MFIs reporting to MIX and will allow IFAD to access MIX's private-access online portal to support its portfolio monitoring needs. The additional research and data capture exercise on community-based financial service providers in rural areas will serve as a first step in determining how MIX can best support IFAD's portfolio monitoring of these models, prevalent in IFAD's portfolio. Moreover, this phase will focus on promoting social performance indicators in the portfolio. Strong financial performance underpins a financial service provider's ability to pursue its social objectives, and achieving social goals generally enhances financial performance.

III. The proposed programme

7. The overall goal of the programme is to contribute to the construction of an inclusive financial system that meets the needs of poor rural people by supporting the growth of healthy microfinance markets and microfinance service providers. The programme's objectives are to: (a) increase the transparency of information in the rural microfinance sector; (b) improve information relevant to the outreach of rural financial service providers; and (c) support IFAD and its partners in improving their capacity for performance monitoring.
8. The target group comprises financial services providers (including MFIs and other rural service providers) and poor, rural households. The programme will promote the sustainability of individual institutions, networks and markets through increased access to information, training and funding. Ultimately, poor rural people will benefit from the increased quantity and quality of financial products and services offered because of healthier markets and financial services providers.
9. The three-year programme will comprise three components with the following corresponding activities:
 - **Increase transparency.** Support IFAD's decision-making on its rural finance interventions by ensuring a constant and growing flow of timely, standard, readily-available data that form the basis of healthy microfinance markets. Through its regional hubs and local partners, MIX seeks to improve transparency in microfinance to the benefit of all actors. IFAD funding will target support to francophone Africa and to Asia, while also leveraging MIX's global, decentralized training, standards and quality support functions. MIX and its partners will work with local MFIs to collect, standardize, publish and analyse their key performance results through the MIX Market.
 - (i) Local microfinance hubs collect and publish MFI information on financial and social performance in key markets.
 - **Improve rural finance information.** Fill important gaps in the information available on rural finance provision, including the actual extent of MFI service provision to rural areas and related economic activities, as well as the non-institutional arrangements and channels that service microfinance in these areas. MIX research will seek to improve the availability of data relevant to understanding access to

financial services in rural areas. Importantly, this wider 'landscape' of information on rural finance will include non-traditional financial service providers, such as village savings and loan associations (VSLAs), self-help groups, financial service associations and others providing financial services in rural areas. MIX will help define the standards for improved reporting in this area through consultation with industry experts in rural finance activities, such as Incofin's Rural Impulse Fund, the Inter-American Development Bank, IFAD and actors serving community-based financial service providers, such as VSLAs. MIX will also produce a summary of its findings on the current state of reporting in this area and highlight how that reporting can best be normalized at an industry level, much in the way it has done for financial and social performance reporting. Over time, this new information will allow funders active in rural finance, such as IFAD, to measure and understand the growth of financial service offerings for poor rural people in a meaningful way.

- (i) Standard data available on at least one of the areas of information needed to understand rural finance outreach, such as geography, product offering, or economic activity supported;
 - (ii) Landscape view of rural finance service providers to supply context and improve monitoring.
- **Support IFAD and partner performance monitoring.** Equip IFAD, its staff and partners to monitor their retail microfinance portfolio and inform decisions on rural finance interventions based on best practice knowledge and industry standard tools. MIX offers a monitoring tool that provides standardized data on key performance indicators for IFAD's portfolio of rural financial service providers. This centralized platform – already in use at other development finance institutions such as the International Finance Corporation and Inter-American Development Bank – enables cooperation among funders to increase the quality and timeliness of MFI reporting. MIX will also deliver progressive online training modules, in multiple languages, that graduate students through topics and certify progress at each level.
 - (i) IFAD's project formulation and review processes supported by knowledge of local rural finance markets and project monitoring.
 - (ii) IFAD staff capacity to analyse MFI information increased.
 - (iii) IFAD portfolios monitored via an online information portal for use by IFAD and implementing partners.

IV. Expected outputs and benefits

10. These are the following:

- MFI information on financial and social performance in key markets collected and published by local microfinance hubs;
- Standard data made available on at least one of the areas of information needed to understand rural finance outreach, such as geography, product offering, or economic activity;
- Landscape view of rural finance service providers developed to supply context and improve monitoring;
- IFAD's project formulation and review processes supported with knowledge of local rural finance markets and project monitoring;
- IFAD staff capacity to analyse MFI information increased;

- IFAD rural finance portfolios monitored via an online information portal for use by IFAD and implementing partners.

V. Implementation arrangements

11. The programme will be implemented by the MIX, a not-for-profit organization that focuses on increasing transparency in the rural and microfinance sector and on generating information critical to the market for microfinance services. Incorporated in June 2002, MIX contributes to the infrastructure of the microfinance market by offering objective data and analysis on the social and financial performance of microfinance institutions and their markets.
12. Since 2002, MIX has trained over 50 external analyst partners and 25 internal analyst staff in its business reporting standards, processes and tools. The success of this training is demonstrated by the rapid increase in publicly available, standardized performance information on MFIs, which has grown from 125 institutions in 2002 to almost 2,000 in 2011.³ As part of improving the availability of information on MFI performance, MIX has also spearheaded the development of industry business reporting standards, participating in a number of working groups on reporting standards development and taking the lead role in developing the industry's current reporting standards, covering both social and financial reporting.
13. MIX's leadership in developing and deploying online information services has rapidly expanded the pool of users with access to timely performance information on MFIs and their markets. MIX Market users have grown from 40,000 visits per month in 2009 to over 70,000 by early 2011. Moreover, these users represent both global and local microfinance actors. More than 55 per cent of total usage comes from developing markets in India, Kenya, Mexico and Morocco, where users can access information in the language relevant to their work.

VI. Indicative programme costs and financing

14. The total cost of this three-year programme of work is US\$4.4 million. Of this total, approximately 25 per cent is requested from IFAD (US\$1.2 million). The remainder will be leveraged from cofinanced external donors' cash contributions (US\$3.0 million) and from MIX's earned income (US\$150,000).
15. MIX financial support comes from core funders that have supported operations since its inception, as well as from restricted grants (project funding) and earned income (fees paid for MIX services). MIX is supported by a number of organizations, including the Citi Foundation (currently US\$250,000 per year), Consultative Group to Assist the Poor (CGAP) (currently US\$400,000 per year), Michael and Susan Dell Foundation (US\$705,000), Ford Foundation (currently US\$180,000 per year), Omidyar Network (US\$3.5 million), Bill & Melinda Gates Foundation (US\$1.6 million) and MasterCard Foundation (US\$2.0 million).

³ www.mixmarket.org.

Summary of budget and financing plan
(Thousands of United States dollars)

<i>Number</i>	<i>Type of expenditure</i>	<i>IFAD</i>	<i>Cofinancing</i>
1	Fixed assets	30	35
2	Software licenses	158	-
3	Other goods and services	96	150
4	Payroll	200	1 278
5	Professional fees	363	1 254
6	Travel	227	481
7	MIX portal membership	126	-
	Total	1 200	3 198

Results-based logical framework

Objectives-hierarchy	Objectively verifiable indicators	Means of Verification	Assumptions
Goal			
Contribute to the construction of an inclusive financial system that meets the needs of the rural poor by supporting the growth of healthy microfinance markets and microfinance service providers	Numbers of rural poor accessing financial services	<ul style="list-style-type: none"> * National statistics * Monitoring and impact studies 	<ul style="list-style-type: none"> * Availability of data * Continued priority of building inclusive financial systems in IFAD's Strategic Framework
Objective 1: Increase Transparency			
Output 1a) Local microfinance hubs collect and publish MFI information on financial and social performance in key markets	<ul style="list-style-type: none"> * Data quality and timeliness increased from an average of 6 months to 5 months (time from FY close to posting) * >500 MFIs reporting social performance data, including 150 first-time reporters * Maintain 85% coverage of known microfinance borrowers / savers represented on MIX Market, even as quantity of known microfinance clients grows 	<ul style="list-style-type: none"> * MIX Market statistics * Industry studies by CGAP, other DFIs or major networks/ foundations 	External conditions allow MFIs to maintain regular, publicly available reporting
Objective 2: Improve Rural Finance Information			
Output 2a) Standard data available on at least one area of information needed to understand rural finance outreach, such as geography, product offering, or economic activity Output 2b) Landscape view of rural finance service providers to supply context and improve monitoring	<ul style="list-style-type: none"> * New data available to the general public on at least one rural finance outreach topic * Expanded country-level landscape data available on MIX Market 	<ul style="list-style-type: none"> * MIX Market * Industry studies by CGAP, other DFIs or major networks/ foundations 	Continued existence of projects that collect and aggregate basic data on a sub-set of non-institutional, community-based microfinance service providers (such as those produced by the Savings Group Information Exchange or by NABARD)
Objective 3: Support IFAD and Partner Performance Monitoring			
Output 3a) IFAD's project formulation and review processes supported with knowledge of local rural finance markets and project monitoring Output 3b) IFAD staff capacity to analyse MFI information increased Output 3c) IFAD portfolios monitored via an online information portal for use by IFAD and implementing partners	<ul style="list-style-type: none"> * Increased coverage of RIMS or other key performance indicators reported on regular basis on IFAD's rural finance portfolio * MFI performance analysis course delivered in at least three languages, twice a year with 100 or more total participants * Regular use of monitoring portal by IFAD staff. 	<ul style="list-style-type: none"> * IFAD project reports and portfolio reviews containing RIMS indicators * Number of registered participants in certification course * Login and usage reports from online monitoring portal 	<ul style="list-style-type: none"> * IFAD provides a steady pipeline of rural finance projects to review * Policies and incentives are in place within IFAD to reward use of continuing education and monitoring systems for rural finance portfolios

Oxfam Novib: Community-led Value Chain Development for Gender Justice and Pro-Poor Wealth Creation

I. Background

1. Since November 2007, the Oxfam Novib programme Women's Empowerment Mainstreaming and Networking for Gender Justice in Economic Development (WEMAN) has been spearheading the development of the innovative Gender Action Learning System (GALS). This is a key methodology used by Oxfam Novib to challenge and change gender inequality in households and communities. GALS is also used to address power issues among communities and service providers, religious and traditional authorities, and private-sector and government actors. GALS uses visual diagramming – a powerful communication tool that conveys ideas and information through pictures, symbols and geometric shapes – to enable people at different levels of the value chain to plan livelihood improvements in ways that bring the greatest benefits to the most vulnerable women and men in the chain; establish multistakeholder consensus on the imperatives of promoting gender justice and prioritizing the weakest parts of the chain; and develop a “win-win” multistakeholder collective vision with immediate and long-term strategies for change.
2. GALS was further developed as a community-led methodology for value chain development (VCD) under the Gender Justice in Pro-Poor Value Chain Development programme which started in July 2009, funded by an IFAD grant to Oxfam Novib. The project was rolled out in Uganda, working with a producer organization and a local NGO in the coffee,¹ maize, bean and fruit value chains. The methodology proved to be effective for:
 - Empowering the most vulnerable women and men in agricultural value chains to develop, implement and monitor their own plans for increasing productivity, quality and incomes, thereby reducing risks and increasing gender equality within households.
 - Bringing about significant changes in property rights, gender-based violence and participation in economic decision-making.
 - Engaging with and gaining the commitment of more powerful private-sector actors at local and national level to develop strategies that reinforce the positive changes among vulnerable groups, as well as address gender issues in their own households.
 - Promoting sustainable communication among value chain actors to continually respond to changing market conditions in ways that benefit the most vulnerable.
 - Clarifying what assistance is needed from service providers.

II. Rationale and relevance to IFAD

3. Gender justice and women's empowerment are essential for economic growth and poverty reduction (World Bank 2010):² reducing gender inequality leads to lower infant and child mortality, improved nutrition, higher economic productivity and faster growth.
4. VCD has been promoted in recent years as a way to combine economic growth and poverty reduction. The move from livelihood projects with limited attention to VCD towards greater involvement of private-sector actors has considerable potential for

¹ See the coffee DVD developed under the small grant on YouTube: <http://www.youtube.com/watch?v=2ZWgm6ZYMUU> (part 1) <http://www.youtube.com/watch?v=HcyGLZ8e1M0> (part 2).

² See World Bank, An evaluation of World Bank support 2002-8, Gender and Development, 2010.

pro-poor wealth creation and women's empowerment. However, many current approaches to VCD, including those used in some IFAD-supported projects have³ had mixed results in facilitating market access for the poorest and contributing to poverty reduction, as they tend to focus on technology and crops rather than on people in complex livelihood systems. Failure to analyse and address poverty and gender constraints affects not only the people themselves, but also the flow of quality goods, transparency of markets and hence, incomes for all. In addition, such approaches often fail to bring about the changes in private-sector attitudes needed for sustainable and equitable win-win strategies.

5. The proposed programme aims to contribute to sustainable pro-poor wealth creation and value chain upgrading in Uganda, Rwanda and Nigeria through the empowerment of women and men from the poorest and most vulnerable households. This will be achieved by adapting and scaling up the innovative GALS methodology for community-led action research in a range of value chains, contexts and organizations in IFAD-supported projects in the three countries.⁴
6. This grant contributes to ensuring that poor and rural people have better access to, and have developed the skills and the organization they need to take advantage of:
 - Natural resources - by addressing gender inequality in land use and ownership, which are key issues for improving productivity and the quality of produce and promoting equal sharing of labour and benefits.
 - Better agricultural technologies - by helping women and men in households as well as value chain actors to share a common vision that enables them to save money and invest more easily in improved technologies - and effective production services – through the community-led action research and development of value chain win-win strategies, which enable service providers to better target their services.
 - Transparent and competitive markets for inputs and produce - by promoting communication and collaboration among chain actors and addressing gender issues such as market discrimination.
 - Local and national policy and programming processes - by linking to local economic development and planning, and promoting policy advocacy.
7. IFAD's recent thematic study on pro-poor value chain development (see footnote 4) suggests that outreach to women and the poorest stakeholders is of crucial importance for pro-poor value chain development. Effective targeting of support services, training and certification to increase efficiency and competitiveness in chains can be seriously constrained when gender issues are ignored or when the roles of women and men in value chains are not taken into account. The study recommends strengthening gender analysis as well as poverty targeting. IFAD's corporate-level gender evaluation⁵ also recommends strengthening gender mainstreaming in VCD and wealth creation for poor rural women.
8. The proposed programme will also contribute to gender mainstreaming and pro-poor targeting in IFAD-supported activities in the above-mentioned countries through learning exchange, capacity-building and dissemination of knowledge.

III. The proposed programme

9. The overall goal of the programme is to contribute to sustainable pro-poor wealth creation, and value chain upgrading in Uganda, Rwanda and Nigeria through

³ See Raswant *et al*, IFAD 2010, and IFAD 2010, Corporate-level evaluation on IFAD's performance with regard to gender equality and women's empowerment.

⁴ Uganda: VODP, NAADS, DLSP; Rwanda: KWAMP, PAPSTA, PRICE; Nigeria: CBNRMP

⁵ IFAD 2010.

empowerment of women and men from the poorest and most vulnerable households and the establishment of equitable participatory processes for economic decision-making at all levels.

10. The programme's objectives are to (i) empower 35,000 direct beneficiaries and a further 65,000 indirect beneficiaries, including vulnerable women and men in rural value chains in Uganda, Rwanda and Nigeria, through direct and peer capacity-building and action learning to negotiate a better position in value chains and achieve sustainable and equitable win-win collaboration among value chain stakeholders; (ii) adapt and integrate participatory action learning methodology into policies and practices of at least 10 civil society organizations (CSOs) in Uganda, Rwanda and Nigeria and disseminate them through e-forums and capacity-building events with a view to scaling up in other relevant IFAD and Oxfam projects in such countries as India, Ghana and Sierra Leone. The involvement of knowledge institutes will contribute to participatory planning and gender mainstreaming in value chain research and training.
11. The target group is composed of vulnerable rural stakeholders (smallholder farmers, labourers, small-scale traders) active in a range of local, national and international value chains. Direct beneficiaries will number 35,000 women and men and a further 65,000 people will benefit indirectly through peer training and organizational replication.
12. The programme will have a three-year duration and three main components, in addition to programme management and administration:
 - GALS adaptation and capacity-building in communities and institutions;
 - Community-led action research, negotiation and win-win collaboration;
 - Development and dissemination of models for using GALS.

IV. Expected outputs and benefits

13. **Outputs/outcomes related to objective 1**
 - Vulnerable and other key stakeholders trained, leading to individual and collective pictorial strategic plans for change in gender relations, empowerment, and improved livelihoods – including plans for peer training and monitoring processes.
 - Sustainable and equitable win-win strategies identified, negotiated and implemented with the more powerful private-sector actors in the value chains.
 - GALS methodology adapted to local context; community-level pictorial manual developed for peer learning; and strategies, structures and demonstration cases established for peer sharing.
 - Preliminary value chain maps of gender and power relations in all the value chains targeted and validated by community-led action research as basis for win-win collaboration among stakeholders.
14. **Outputs/outcomes related to objective 2**
 - Capacity of Oxfam Novib and IFAD-supported projects strengthened in the community-led gender action learning system for ongoing implementation and scaling up beyond the programme in a range of value chains.
 - A range of models for gender action learning and win-win strategies identified, implemented, evaluated and documented in a variety of contexts, chains and organizations.

- Capacity-building materials for community-level and organization-level peer sharing (for the private sector and third-level research/education institutes, for advocacy with local governments and for replication elsewhere).
- Third-level research/education institutes are engaged in the process.

V. Implementation arrangements

15. The grant recipient is Oxfam Novib, a not-for-profit organization registered in the Netherlands. Oxfam Novib will coordinate the strengthening of coalitions of implementing CSOs in each of the three countries, and will define/oversee links with IFAD projects. The programme team – a WEMAN team currently based in the Netherlands⁶ – will be responsible for overall programme implementation. A global programme steering committee will be responsible for strategic decisions and supervision/oversight. Three national advisory committees representing the stakeholders will be formed in-country. An M&E system will be developed at local, national and international levels. Contract management of the agreement with IFAD (including six-monthly reporting, financial control and audits) will be undertaken by the same WEMAN team.
16. At country level, a national coalition will be formed by the implementing CSOs, with quarterly national coordination and M&E meetings. A lead organization will be appointed to coordinate regular communication with the programme team in Oxfam Novib. The CSOs have been selected based on their track record and long-term partnership with Oxfam Novib as well as their involvement in VCD. Their primary role will be to apply the GALS in these different value chains, help develop models for integrating the GALS, and exchange their knowledge and experience with the IFAD-supported projects. The coordinating CSOs will ensure the effective participation of the various organizations in capacity-building events and other meetings; liaise on behalf of the coalition with knowledge/research institutes and IFAD projects (although this function may be delegated where opportune), and coordinate country-level M&E, reporting and documentation.
17. Delegates from the implementing organizations will meet every six months as an advisory committee, which will also include key stakeholders at the national level. The committees will provide guidance and feedback to the programme team and the steering committee.
18. The programme team will focus particularly on capacity-building, including procurement of consultancy services for knowledge management, documentation and facilitation of peer sharing among organizations in Uganda, Rwanda and Nigeria.

VI. Indicative programme costs and financing

19. The programme will be implemented over three years, at a total cost of US\$2,232,000. IFAD will provide US\$1.4 million, or 63 per cent of the total cost; Oxfam Novib US\$770,000 (34 per cent) and implementing CSOs in Uganda, Rwanda and Nigeria US\$62,000 (3 per cent).

⁶ Oxfam Novib is currently in a process of decentralization. Country specialists will in the future be based in or near the country of implementation.

Summary of budget and financing plan
(Thousands of United States dollars)

<i>Number</i>	<i>Type of expenditure</i>	<i>IFAD</i>	<i>Cofinancing</i>
1	Personnel (including subcontractors)	180	107
2	Professional services/consultancies	29	17
3	Travel costs	20	12
4	Operational costs, reporting and publications	136	81
5	Training/capacity-building	1 035	615
	Total	1 400	832

Results-based logical framework

	Objectives-hierarchy	Objectively verifiable indicators	Means of verification
Goal	To contribute to sustainable pro-poor wealth creation, and value chain upgrading in Uganda, Rwanda and Nigeria through empowerment of women and men and the establishment of equitable participatory processes for economic decision-making at all levels	<ul style="list-style-type: none"> 70% of Household with increased assets ownership index Reduction in prevalence of child malnutrition 70% of Household with greater income and food security Increase in educational enrolment rate 60% of women feel more supported by men leading to more sustainable livelihoods, and more secure access to land Poor women and men producers, and traders are empowered as VC actors improving efficiency in 6 VCs 	<ul style="list-style-type: none"> Baseline and impact survey M&E, RIMS reports and impact assessments Socio-economic statistics Participatory monitoring Annual Work Plan and Budget of ON and IFAD projects Final external evaluation
Objectives	<p>Objective 1: 35,000 direct beneficiaries and 65,000 indirect beneficiaries, are empowered and 'win-win' collaboration between VC actors are achieved.</p> <p>Objective 2: Participatory action learning methodology is integrated into policies and practices of 10 CSOs and disseminated into IFAD & ON projects.</p>	<ul style="list-style-type: none"> Platforms established by at least 7 CSOs for multi-stakeholder win-win collaboration 35,000 women and 15,000 men use the methodology for improving livelihoods and VCD Multi-stakeholder win-win strategies planned in 6 VCs 10 CSOs use the GALS VC methodology Opportunities for wider up-scaling identified in at least 4 IFAD and ON projects 	<ul style="list-style-type: none"> Six-monthly and final reports International review meetings Final external evaluation Annual revision of CSO Action Plans Case studies for each chain Training materials Feedback from IFAD projects
Outputs	<ul style="list-style-type: none"> Key stakeholders trained on GALS GALS methodology adapted to local context Capacity of ON and IFAD strengthened in the GALS Win-win strategies for VCD implemented Training materials developed 	<ul style="list-style-type: none"> Community participants in 10 CSOs developed their stakeholder analysis, and plans using the methodology. Multi-stakeholder win-win trees implemented and monitored 10 CSOs have developed a pictorial manual for community-level peer sharing 10 CSO have improved understanding of power and gender dynamics in the chains for planning VCD. 	<ul style="list-style-type: none"> Multi-stakeholder plans Participatory monitoring Availability and quality of manuals on participatory VCD Report of the inception workshop Reports from CSO partners
Key Activities	<ul style="list-style-type: none"> Preliminary value chain mapping. International inception meeting Community-level field test International workshop Ongoing capacity-building Final review workshop Community-led action research Development of capacity-building materials Dissemination through e-portals Research institutes are involved 	<ul style="list-style-type: none"> VC maps of power relations and gender inequality Detailed design of GALS field tests Community participants have developed a GALS manual for community-level peer sharing. 10 CSOs and IFAD projects participated in workshops to draw up lessons learned from the field Final review and final sustainability plans developed. Detailed plans available in CSOs for up-scaling, Capacity-building materials available on internet Research institutes have developed plans for incorporation of the methodology 	<ul style="list-style-type: none"> Reports and action plans from the international inception meeting Pictorial GALS Manuals and outcomes of field tests Organisational plans for stages 2 and 3, workshop reports, progress reports Track record of e-discussions, resources on WEMAN website Quarterly monitoring reports, mid- term review, final review