EXPERIENCE CAPITALIZATION

FROM THEORY TO PRACTICE: TRYING OUT A NEW APPROACH

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The “Capitalization of Experiences for Greater Impact in Rural Development” project is implemented by CTA in different parts of the world, in collaboration with the Food and Agriculture Organisation of the United Nations (FAO) and the Inter-American Institute for Cooperation on Agriculture (IICA), and with financial support from IFAD, the International Fund for Agricultural Development. This project aims to facilitate the adoption of an experience capitalization process in rural development initiatives, where it can help improve the analysis, documentation, sharing, and the adoption and use of lessons and good practices – as an approach for continuous learning, improvement and scaling up.

The cases featured in this booklet were selected and written by those participating in the project. Responsibility for the information and views set out in each case lies entirely with the authors. Reproduction is authorised provided the source is acknowledged.

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Starting in April 2016, CTA implemented the project called “Capitalization of Experiences for Greater Impact in Rural Development”, working in partnership with FAO and IICA, and with the financial support of IFAD. For a period of three years we worked with projects and organizations, and with their representatives, in different parts of the world, including in areas where CTA does not normally work, like South East Asia or Latin America. Throughout these 36 months, the work of hundreds of development practitioners helped validate an experience capitalization approach, showing that this is an efficient way to look back at a particular development initiative, to analyse it, document it and share lessons – and to encourage their adoption.

One of the project’s last activities was to organise a meeting with those who took an active role as facilitators, and who helped guide the series of capitalization processes which the project supported in different parts of the world. This was planned to complement the online discussions that had been going on between them – and together discuss the conditions, requirements or the factors underpinning an effective facilitation process. The meeting helped validate many of the issues identified during the preparation, implementation and evaluation of the different capitalization processes in which many persons were involved. It also helped identify what is needed now to support the processes already initiated and to be completed, or to start new initiatives.

The narratives included in this publication served as inputs for the discussions at the meeting. Written by those who were actively and directly involved in the different steps of the project, they show the main issues they faced during the training workshops and also in the field, and the main lessons they drew as participants, facilitators or as experience capitalization “champions”. Although based on concrete cases, the fears, observations or ideas included in each one of these articles will be easily recognised by those playing a similar role. They are therefore a good complement to the facilitator’s guidebook recently published by CTA.

Good reading.

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Yennenga Kompaoré
Since 2016, and as part of the work of its Learning, Monitoring and Evaluation Unit, CTA has been working to validate an experience capitalization approach, and to demonstrate that it can effectively lead to lessons and recommendations which can help improve or upscale development interventions.

We worked with representatives of projects and organizations running development initiatives in more than forty countries – working in all of these cases with field officers, M&E specialists, project leaders or with a knowledge management team – and all of the participants went through the different steps involved, effectively completing an experience capitalization process. Yet in many cases, “experience capitalization” was a totally new concept. Everyone recognised the potential advantage of describing and analysing a particular case, and of drawing lessons which can then be used by others; and everyone recognised the difficulties which all of those in the field have when trying to do this. But not everybody had heard of experience capitalization as an approach or as a methodological process; only some had been involved in a similar process in the past, and even fewer participants had had to play the role of facilitator, supporting and helping others complete a similar exercise.

One of the key elements of the CTA project was that of “learning by doing”. More than sharing theory with all participants, we were interested in starting a series of capitalization processes, and in going through the different steps needed – and in this way show the need of a comprehensive approach, and show the benefits that a complete process can bring. Together with this, another key element was that of “practising what we preach”. So just as participants described and analysed part of their work, or part of the projects implemented by their organizations, they were also asked to describe and analyse the process they were engaged in, and to share the main lessons they would draw regarding an experience capitalization process. The stories included in this publication are some of the results of this effort.

What is experience capitalization?

The first section focuses on experience capitalization as a process that covers different phases, but one which is not always well know (as Felix Mlay said, “I had no clue what is was about”), and this was a particular challenge. The different stories included here show how the approach came to be known, how it was seen to fit with the activities and processes regularly running in their organizations, and what were the steps that were recognised as necessary to ensure that implementation would be completed.
The second section looks at the different phases, starting with the need to plan a process in detail, and the need to involve participants from the very beginning. Gloria Nyamuze talks of the need to “frame” the process, focusing on a specific experience and on the information which is directly related to it. Dirce Ostroski looked back at the difficulties she regularly had when writing a final report or when sharing information about a specific project, and shows the benefits of using a set of table or templates to organise the information available. And Marta Araujo shares the model she prepared after the discussions she had with many participants.

**A long-lasting effort**

Starting and completing an experience capitalization process was everybody’s aim, but it was not the only objective. Following the project’s main goal of supporting the adoption of experience capitalization as an approach, and having it as a regular and recurrent effort, many participants took an extra step, and worked to ensure that the necessary conditions for this adoption would be in place. The stories in the third section describe the work they did – sharing the main results in international events, organising internal discussions, or looking for stronger links with the M&E team and with the activities they plan and implement. And as Yennenga Kompaoré does, looking back at their own role as facilitators.

More than 400 persons joined the different workshops that CTA organised as part of this project. This is therefore only a small sample of stories and lessons, but one which we hope will encourage many others to follow. Please share your own ideas and views!

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WHAT IS EXPERIENCE CAPITALIZATION?
IT’S ALL ABOUT THE HOW

Karen Hampson
Experience Capitalization is a relatively new term, but it covers similar principles to documentation or process evaluation. For me, Experience Capitalization is the HOW: in terms of “how are we doing things,” “how did we get to where we wanted to get,” and of “how did some aspects of a project work well and some not so well.”

Much of conventional M&E is around measuring impacts – as part of my work at Farm Radio International (FRI) I spend a lot of time working on log frames and indicators, trying to measure impact, and a lot less time trying to measure how we got that impact in the first place and whether it is actually a logical progression from activity to outcome. An experience capitalization process differs in the sense that, when you ask teams to assess how they did things or whether they did them well, they will usually think in terms of numbers or outputs, rather than processes. In that sense, a lot of useful detail can be lost.

Because EC is focusing more on what you’ve done and how you’ve done it, some people find it difficult to work out how to assess and share important observations with others. It’s sometimes difficult to say, “Maybe our organisation didn’t do this right” when it’s easier to say, “Our organisation planted 400 trees.”

**A useful assessment of programme processes**

Sometimes, organisations just carry on doing what they are doing and never make a change in their methodology. In a sense, if your project is getting a result that you want, then you can argue that you’re doing the right things. But it’s very rare that that happens because humans are messy and development is messy. It’s not linear, so Experience Capitalization is there to stop you making the same mistakes or, even if you didn’t make any mistakes, you can still ask what you might do differently next time: “Could we involve more people?” or, “Could we have looked at something differently?” or, “As it was so successful, could we have aimed at a bigger target?” It’s trying to encourage a process of learning or trying to do better.

Sometimes things will happen that you hadn’t planned for, a good result that you hadn’t put any activities in place to achieve, for example – so you need to ask “How did that happen?” If it’s a positive thing you need to find out how it happened so that you can do it again: FRI had a project where we were
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ways of self-improvement in order to learn and progress. Often people only truly appreciate this EC process when they see the end product. It’s only when you’ve been through the painful process – of examining what you’ve done and why you’ve done it, what went well and what didn’t – that you realise how useful the exercise is. Reflection can be the best source of innovation.

After joining the meeting CTA organised in Rome, in October 2016, I started writing an EC component into some of our projects as a deliverable milestone. Colleagues have found it to be very useful. In fact, it has helped in a couple of instances to get a second phase of a project. In one case, we wrote a short process evaluation into a multi-partner nutrition project. We ran a two-day workshop with all of the NGO partners sitting around a table, along with farmer representatives. We had to ask difficult questions: one partner will know what their own strengths are and what they found out, but another partner might not. So, when all the actors get together and ask difficult questions of both their own colleagues and of the wider team, the understanding of the roles of each project partner increases, as does the understanding of what each partner expected of others in the team.

Experience capitalization and its effect on the way we work

Some people can at first find it difficult to grasp the concepts and do the necessary self-reflection to gain a successful result. But it’s important to try, as you have to be open to looking for any mistakes and finding ways of self-improvement in order to learn and progress. Often people only truly appreciate this EC process when they see the end product. It’s only when you’ve been through the painful process – of examining what you’ve done and why you’ve done it, what went well and what didn’t – that you realise how useful the exercise is. Reflection can be the best source of innovation.

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The process increased the respect in which we held each other, because we could better see the
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We’ve termed these *Insight Reports*, because they are quick to write, often striking, and sharing them is useful on many levels both within and outside our organisation. And it’s with these short *Insight Reports* that we feel we can capture the hearts and minds of: donors, both institutional and private, of organisations with which we can deliver the best projects – and, of course, of those who stand to benefit from our interventions.

**An essential part of the process, or icing on the cake?**

Experience Capitalisation is a very useful process, but with ever-squeezed budgets it can be seen as an add-on to be cut when there is not enough money. However, when done well, it should produce two or three key recommendations for future projects.

FRI has invested a fair amount of time in developing EC in projects, in terms of how the process can be done through the radio or how it can be done to support our radio-based projects. Through that investment, it has grown in importance within the organisation. We have realised the importance of capturing short project learnings, so we have now started to encourage staff to write down their insights and ideas.

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MY FIRST JOURNEY WITH EXPERIENCE CAPITALIZATION

Felix Mlay
In 2017 I was invited to participate in an experience capitalization workshop organised by CTA in Kigali. I had no clue what experience capitalization was about, and what I could gain from it. When I arrived in Kigali, I found out that I was not the only one.

In a nutshell, experience capitalization is about making implicit knowledge explicit and sharing this knowledge widely. In the Kigali workshop, we became familiar with some of the theory, and at this point we were eager to learn how to put it into practice.

Fortunately the workshop was not just theoretical, but about actually starting your own experience capitalization process. The first step was to select an experience of your own. I needed to select an experience that I knew very well, for which there was sufficient information, and for which there was potential to draw useful and relevant lessons from.

**My experience**

I decided to document our experience, working as service provider for the Singida project in central Tanzania. For this project, I was the team leader in Manyoni District. The Singida project was about empowering producers and strengthening market linkages. This was mainly done through improving productivity and post-harvest handling, and by improving households’ access to capital. It ran from 2015 to 2017, and was part of a larger project on marketing, infrastructure, value addition and rural finance (MIVARF) funded by the International Fund for Agricultural Development (IFAD).

As project leader, I knew a lot about this project, and I was responsible for writing regular progress reports. I felt I had some important lessons to share on how we were managing to improve the production of sunflowers, and improve market access and fair shares for smallholders. Furthermore, as the project had had positive results so far, I thought it would not be hard to find motivated participants to take part in the experience capitalization process.

**Digging into details – the Kigali workshop**

In the next part of the workshop, I had to describe the project in detail, so I looked into everything which was done so far, the results achieved and the main difficulties faced. Although I had to focus on my own case, it was good that we were there together as a group. We could discuss and give each other suggestions.

One of my challenges was that we had so many different activities in the Singida project. For example, we brought together key players like producers, processors, buyers, government officials, and financial institutions, and set up a forum committee who were actively involved in the activities of the project. To improve farming practices, we organised “farmer field schools”,
where “lead farmers” who practiced new approaches, transferred their skills and experiences to fellow farmers. To reduce post-harvest losses, we set up a warehouse, with a corresponding warehouse receipt system. To improve sales, we organised collective marketing in producer groups. It was difficult to describe so many activities but the progress reports I had written previously, and my memory, helped with this part of the process.

The next step in the workshop was the analysis, in which I had to dig a bit deeper. Why did things go wrong? And why did other things succeed? For example, some stakeholders were reluctant to be involved in the forum committee. We found out that it was because no allowances were paid. However, in the end it turned out to be positive not to pay allowances, as only the most enthusiastic people became involved. Another example is that we learned that it was very important to involve local leaders and local processors to gain farmers’ confidence for the cooperative approach we wanted to use. Their involvement helped a lot in gaining the farmers’ trust.

At the end of the workshop, I had a good description and analysis of my experience. However, I still wanted to add more information from other stakeholders, share it with my colleagues for their input, and verify the recommendations and conclusions.

At home, while preparing for the follow-up workshop in Arusha, I tried to collect more information from the farmers, the processors, and my two colleagues with whom I worked on the project. I did most of this in face-to-face meetings where I started by explaining the goal of the experience capitalization process. After this introduction, I collected their views on why things turned out positively or negatively. In these meetings, we also discussed the best ways of sharing the experience once it is written down as a story.

**Putting pen to paper – the Arusha workshop**

In the second workshop, in Arusha, we discussed our progress with the process of experience capitalization. It was useful that we had each managed to describe and analyse our experiences beforehand. We were ready to write. We learned more about documenting (writing, editing), and we thought about how to go about using the lessons learned from the experience in the future. Furthermore, we discussed our sharing strategies and talked about how to mainstream the experience capitalization processes in our own organisations. It turned out that I was not alone in having enthusiastically returned from Kigali to share my first lessons on experience capitalization with my management team and colleagues.

The workshop gave me the confidence to draft a first story of my experience. I e-mailed it to my colleagues, who quickly gave me their feedback. I also sent my story to the workshop facilitators for their comments. When the article was finished, I shared it with the project stakeholders, including local politicians. In order to reach a broader audience, I am planning to publish the article in an international journal, as well as in a couple of Tanzania’s newspapers.

Besides these ambitious plans for my first story, I am working with my colleagues to get to work on documenting their experiences. I will facilitate this process and we are now trying to set up a knowledge sharing centre in the focal area of the project.

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**Why only stick to documenting our experiences at work, we can gain a lot from also keeping track of the lessons learned from life in general!**
The stories we document will be kept here, and be made available for farmers, extension officers, project staff and other stakeholders to learn from. This way, when we come across problems in other projects, we can make use of similar experiences elsewhere, to solve them. I feel that we can take this process even further: why only stick to documenting our experiences at work, we can gain a lot from also keeping track of the lessons learned from life in general!

Felix Mlay worked as marketing consultant at Mellon Consultants Tanzania Ltd, and served as project leader within the IFAD-funded project on marketing, infrastructure, value addition and rural finance (MIVARF), Tanzania. His article, “Improving sunflower production and reducing post-harvest losses” was published in 2018.

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WE FOUND THE PROCESS SUITED US

Solomon Elorm Allavi
For several years, we at Syecomp have been engaged in implementing projects – funded by national and international donors – and we have found that our key constraints have been documenting the impact of our work and sharing it effectively with the general public. When my colleagues and I heard about Experience Capitalization, we were very interested.

Syecomp was funded to implement a 14-month proof-of-concept project with CTA, and our team was called upon to document its impact on the beneficiaries – in this case the small-holder farmers and the extension officers – and also on Syecomp itself, as the implementing company.

*We found the processes suited us*

As part of this process my colleagues and I read a lot of literature about Experience Capitalization, and attended a couple of writing workshops. They were designed to reinforce the guidelines around how to present stories. We discovered during the course of seminars and exercises that documentation is not simply concerned with writing purely quantitative accounts. How the processes were carried out, how many people attended training, their outcomes, and so forth, are only aspects of the result. No, we started to think more about how to “storify” a case: how to present engaging narratives from the perspectives of all those involved with or affected by the project.

We realised that our own processes are not too dissimilar from those we learnt about at the workshops. But we came to understand that there were, in fact, a lot more levels, many more points of interest that we could include in our writing to help us engage better with the wider public: we discovered through the workshops that we could apply a kind of “value addition” to our written reports.

*What we’ve changed*

For example, we might previously have developed a report about our project’s beneficiaries. But with the experience capitalization approach we are now looking beyond just the simple, face-value facts toward the whole scope of the project, at the various sections within the project as implemented, and trying to analyse each and every component: the objective of the project; the institutions outside it; our experience of implementing it; and then how the ideas follow up –
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understanding between us, referring to what they remembered and cross-checking it with the available literature. It’s not just one person from my company participating. Everyone understands their role in the project and how to use the experience capitalization process to document what we do. We all enjoyed learning from each other, and the knowledge is easily transferable. So much so, in fact, that even though one person who attended the first workshops in Accra was unable to attend the second one, I was able to step in without hesitation; and I feel that I was able to make some meaningful contributions to the proceedings.

Over the course of this most recent workshop, we have come to realise that Experience Capitalization needs a more of a team-based approach. There are a lot of different competencies involved when you are designing and implementing a project. Let me explain: there’s a project designer; a project implementer; and then there’s the team member who does the impact evaluation. And let’s not forget the beneficiaries! But, with Experience Capitalization, all of the team-members can come together and look at every individual – funders, team members, the various beneficiaries, the roles they all play in the project – and bring on board their ideas. This provides for a much more comprehensive way of documenting a project – yet without losing sight of its key areas.

whether, for example, to truncate the project or think of innovative ways to actually grow or expand it.

This is something very new to a lot of us, especially private-social enterprises in Ghana. You’re no longer focusing simply on the individual beneficiaries of a project; you’re looking at the project in its entirety. I think that this is something that we will incorporate into our internal operations, too: at Syecomp we implement a lot of projects for commercial agribusinesses, and if we can disseminate to potential partners what we can learn and how effectively we can work, then we’ll get a lot more collaborators and possibly even funded projects. So, I think that Experience Capitalization is actually a way forward in terms of project documentation, in terms of project write-ups and so on, and for social enterprises in particular, that’s a real head-start.

**Working as a team**

We realised at Syecomp that, from the start of the process, everyone involved had to have a good knowledge and understanding of the processes involved with Experience Capitalization. My colleagues who attended the first workshop made sure when they returned to the office that they briefed the rest of us as fully as they could. We all asked them questions and tried to clear up any issues of
Helpful tools

So one of the key things that my colleagues and I will take away from this process is how better to use the tables (or templates). And by that I mean constructing a table and using all of the boxes it contains to capture all the components of the project. It means that nothing gets overlooked. It’s not like a business-model canvas, it’s bigger and therefore more comprehensive, and all of the boxes in the table go together to capture the flow of the project. It sounds like it should be more difficult, more complicated, but what we find is that by referring to the structure of the table, it’s almost impossible to miss anything out when you’re writing-up. It actually makes our work very easy. The tool is very, very useful. We’ve used it in our office since we were first introduced to it and our writing has developed very satisfactorily, and we realised that it is very collaborative, too. Our team members understand how to use the table, how and when to feed information into the various fields, so that when writing up, the facts can be teased out and we come away with clear summary of what happened and that’s really easy to share with anyone who’s interested.

The way forward

And the most surprising thing that has come out of this? We had written a very good grant-completion report for USAID, we’d come out with a position paper that was submitted nationally and shared globally, but we didn’t do any internalisation of the whole project, just a general report. But now, with these techniques, we’re going to publish a revised report on our learning portal, and then the whole world will be able to have a look at the experience capitalization approach. It’s very different from our existing practises of just writing reports for the funder, so this has been very helpful for us!

Solomon Elorm Allavi works for Syecomp Ghana Ltd based in Accra, Ghana. Syecomp is a private-sector provider of satellite and drone-based information and analytics, Geographic Information System (GIS) services, and localised weather forecast information to small-holder farmers and other agribusinesses across Ghana. The article signed by Solomon’s colleagues, “Mainstreaming gender and youth in Ghanian agriculture policy” was published as part of the booklet focusing on West Africa.

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PRACTICE WHAT YOU PREACH... BUT WHAT TO PREACH? AND HOW TO PRACTICE?

Marc Lepage
My job is to make sure that we learn from what we already know. It sounds easy, but it’s not as straightforward as one thinks.

For several years I worked with the United Nations Development Programme (UNDP) at the regional hub for Africa. I wanted experience capitalization to become a regular part of UNDP programmes, and in the end, of everybody’s work. However, it was clear that knowledge management is too often not getting the attention it deserves. In practice, it meant I had to advocate for knowledge management activities like experience capitalization in work plans, but also organise workshops to train the implementers at different levels in the organisation. This is where my experience as a facilitator came in.
At the end of this hands-on workshop we had 15 excellent plans for stories, ranging from the production of power via a micro dam to engaging with local leaders dealing with the refugee crisis.

Learning along the way

I facilitated a workshop (organised by UNDP) on knowledge management in East Africa in October 2016, where I successfully pushed for people from the field to participate. I thought it was very important that community members, those who really hold development knowledge in local communities, also learn about knowledge management. I used the knowledge sharing canvas, “a toolkit for knowledge enthusiasts to succeed”. The approach turned out to be a bit too theoretical and abstract, and after a while my participants were no longer “knowledge enthusiasts”. We saw that key messages were “lost in translation”; not just because of the language, but also because the concepts didn’t resonate with the participants’ daily practice. Too much time was lost in explaining why they were participating, demystifying concepts, and motivating them to value knowledge sharing approaches.

After that workshop in East Africa, I joined a four day workshop on experience capitalization in Ghana, organised by CTA. The concepts were not new to me, but the workshop had a practical bent that was namely to work towards creating a “knowledge product”, such as a story, that could be easily shared. After my experience in East Africa, the value of this approach made an impact on me, and I was keen to try this new approach in my next workshop.

Experience Capitalization

fast forward

My next workshop was in Kampala, Uganda (organised by UNDP) in April 2017. I had two days with participants from Ministries, local government departments and development organisations who are working on the UNDP project called “Inclusive and Sustainable New Communities”. Instead of getting too bogged down in concepts and making the case for knowledge management, after a short introduction and explanation of the concepts, we dived straight into planning for creating a knowledge product. At the end of this hands-on workshop we had 15 excellent plans for stories, ranging from the production of power via a micro dam to engaging with local leaders dealing with the refugee crisis. What’s more, all the participants were super excited and engaged and ready to follow through with their plans.

What to keep in mind

When reflecting on the two different workshops, a couple of observations came to mind.

First, it is important to know your audience. In the first workshop I was talking to community members. Whereas in the second workshop in Uganda, thanks to the participants’ professional backgrounds, they were
more used to thinking conceptually, and convincing them about the value of knowledge sharing was less time consuming. Another observation is that a “hands-on workshop” is a good way to be able to end up with some great plans that are ready to be put into practice.

Keeping in mind that every group of participants is different, there is always the need for tailor-made programmes. There is no single blueprint. Some of the variables that I think about include: the time available, the pace of the programme, the balance between theory and practice, and the amount of “handholding” you provide to the participants. There is no such thing as facilitating the perfect workshop but these recent experiences have certainly helped me to get better results for knowledge management.

Marc Lepage worked as Knowledge and Innovation Advisor at the UNDP regional hub for Africa, Addis Ababa. He joined the workshop and all the participants whose stories were later published as “Insights on rural development in West Africa”.

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WHAT’S IN THE SANDWICH?

Marygoretti Gachagua
I participated in one of the training processes on experience capitalization following what CTA describes as a “sandwich model”. This involves two workshops with a support period in between. I would like to draw your attention to the process in between the two workshops – a very important part of the sandwich!

Getting started

I work with the Eastern Africa Farmers Federation, an umbrella organisation that offers services to our members who are national farmers federations in Eastern Africa. Knowledge Management is part of a longer term programme for us. But, as we are a small organisation, we work together with others to provide services. Through the experience capitalization workshops, together with CTA, our goal was to get our members motivated to, and capable of, sharing their experiences and learning from each other.

I was asked to help organise the process and follow-up after the first workshop in Nairobi. I selected the participants from our national member organisations in Uganda, Tanzania and Kenya. I selected four organisations based on a few criteria, and based on our previous experiences working together – these are all “vibrant” organisations with a good reputation for representing farmers on the ground. The organisations were the Kenya Livestock Producers Association (KLPA) and the Kenya National Farmers Federation (KENAFF), the Uganda National Farmers Federation (UNFFE) and MVIWATA, the national federation in Tanzania. I spoke with the respective CEOs who helped to select three participants per organisation. Where possible I wanted a programme officer to join us, a monitoring and evaluation (M&E) officer, and a communications officer. I thought that this combination of people would be complementary as they each work at different levels and could help each other when filling in information gaps in their stories. Moreover, it was important to include people who are actually communicating with farmers.

In Nairobi, we followed the structure of FAO’s online learning module called “Experience Capitalization for Continuous Learning”. All of the participants succeeded in selecting their stories to tell, and made a start in collecting, organising and analysing the relevant information.
I learned that probing is key and in the end the participants even told me that they really appreciated my questions!

**Filling up the sandwich**

After five constructive days in Nairobi, we all went home and back to our offices. Our daily tasks were screaming for attention but it was my job to make sure that everyone’s process of experience capitalization stayed on track. This would ensure that we could get the most out of the second workshop that would take place in Arusha. I needed to follow-up with each participant and help them to continue collecting, organising and analysing information for their stories.

After four weeks back home, I made an appointment with each organisation to visit them. The first meeting took place from 15-18 November 2016 and by mid-February 2017 we were busy with final reporting. In each organisation, I sat with the three participants from the workshop for two days. During this time we refreshed our memories on the stories that they each wanted to tell. We then looked at the tables that they had started filling in during the first workshop. Some had not progressed any further than where they left off in the workshop, others had taken the process further. Those who hadn’t yet continued working on their tables told me that it was difficult to find time for such an exercise when you are back in your regular work rhythm. Also, for some of them the tables we had to fill in were not clear enough. And, as the FAO learning module was online, lack of internet connection was another hampering factor in some cases.

Together we picked up the tables and tried to fill them in as comprehensively as possible. My continuous probing – “How?”, “What?”, “When?”, “Where?” and “Why?” – seemed endless to them. I learned that probing is key and in the end the participants even told me that they really appreciated my questions!
To get the most out of their experiences, I tried to listen carefully to what they told me, and made sure all three participants contributed to their peers’ stories. I encouraged them to help each other and make it a collaborative effort. When I left after these two days, it was clear to them which information was still missing, and they knew how to continue. Although I was gone, I stayed in close contact with the participants and provided help when needed. Whatsapp was a nice medium to continue the communication and keep spirits up.

Some extra flavour

But what kept them motivated to keep going? I think all of them were very enthusiastic about becoming authors of published articles. It also helped that three people from each organisation were working side by side as they were able to motivate and help each other with missing details and feedback when they got stuck.

Apart from that, as a facilitator, I was able to tell them about the experiences of other members of the Eastern African Farmers Federation. They often had no idea what others were up to and upon learning about many interesting experiences, the need to share their own experiences became even more clear.

Looking back, it also helps if there is someone interested in your results. This role of a facilitator might be even more important than you think.

Finishing touches

After all this hard work, we had the second workshop in Arusha in March 2017. Here we learned about sharing, writing, scaling up, and institutionalizing the experience capitalization process within our own workplaces. Although I had facilitated the process so far, this second workshop was a very important learning experience for me as well. As we say in Kiswahili, “nganga haijgangi” or, “a witch doctor doesn’t cure herself”. I had no clue how we would turn all the information we had collected in the tables into clear and concise stories. Learning more about writing gave me some new tools to continue with my “witchery” as a facilitator.

After the workshop in Arusha, I continued assisting the participants with their writing, but also wrote a document reflecting on how the experience capitalization “sandwich” went. The main lessons I learned on facilitation are:

• Choose your participants in such a way that they can help and motivate each other. Choosing three people, with different functions, but from the same organisation, certainly helped a lot.

• It’s learning by doing. After a first workshop not everybody is ready to continue by themselves so it’s important to keep in contact in between two workshops.

• Careful listening and probing is key to getting the most out of people’s stories.

• Don’t underestimate your own time (and money) it takes to follow-up with the participants. The role of a facilitator can be never ending, but without financial and institutional support the processes can easily collapse.

• Keep on learning yourself! When I started the facilitation process on experience capitalization it was all new to me, but that is not the case anymore!

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EXPERIENCE CAPITALIZATION

From theory to practice: Trying out a new approach
2 DIFFERENT STEPS
COLLECTIVE PLANNING FROM THE GROUND UP

Rituu B. Nanda
I’m based in Delhi and work for an international non-profit organisation called The Constellation. I encourage communities to engage in the Community Life Competence Process (CLCP). This is a process built around a learning cycle where a community takes action and learns from their own experience. The learning then becomes the basis for another round of action and, in turn, learning. The learning cycle can continue indefinitely.

We firmly believe that communities have the capacity to respond to the challenges regularly seen in the rural areas – but only if they own the issue they struggle with. This belief is reflected in SALT, our mode of interaction with communities. SALT stands for “Stimulate and Support”, “Appreciate, Authenticity”, “Listen, Learn, Link”, and “Transfer, Team, Trust and Transform.

From reflection to documentation

At Constellation we reflect a lot, but we don’t document systematically. Documentation is important, and not only to help ourselves share the lessons we have drawn: when you document you reflect and learn even more. This is why I decided to participate in the Goa workshop on experience capitalization organised by CTA in June 2017. I joined the workshop with two colleagues from India who work with me on an immunisation project with communities in Assam, in the north-eastern part of the country. A colleague from Indonesia also joined us.

I felt it was important that I didn’t go alone and that my colleagues, who spend more time in the field than I do, would also have an opportunity to learn about experience capitalization. We thought it is practical to have as many people within the organisation “on board” and ready to put in the extra work that an experience capitalization process demands. We didn’t have additional budget for this, but together, we did have plenty of enthusiasm – one way of dealing with our financial constraints.

A collective effort

What I liked about the methods used for experience capitalization is that they are participatory and reflective. Instead of just the manager of a project writing a document, you sit together with a diverse group to collectively document an experience.

Through this, different actors, ranging from people in the communities to field workers and project managers, get a sense of ownership of the process. This is a real strength in the experience capitalization approach,
As a result of engaging and listening to the people on the ground, our plan has completely changed.

as all too often the experiences of the communities, and people in the field, are overlooked. However, the participatory part is also the hardest and most time-consuming part of the process and it may force you to change track. Not surprisingly, the planning of our experience capitalization process took a different direction when we involved the grassroots level staff and communities.

When a plan changes course

During the workshop in Goa, my colleagues and I went through the planning exercises. We came out with an idea of what we would find interesting to document. We had a plan to focus on the degree and depth of participation of communities and ownership within the immunisation project in Assam. About one month later, we, the experience capitalization team, had five days in the field together and planned half a day with different people associated with the project – Constellation Global support team members and evaluation team facilitators in the field. After spending time with two different communities, the plan took on a new shape and life.

When we visited the communities and we asked the people what was important to them, we discussed a lot and really wanted to know, “what does your heart say?” This process proved to be so important because, as a result of engaging and listening to the people on the ground, our plan has completely changed.

One community wants to focus the experience capitalization process on men’s involvement in immunisation initiatives. And in the second case, the NGO facilitator wants to document the “power of listening.” What has changed as he and other members of his team have begun to actively listen?

Work in progress

Visiting the field shortly after the workshop proved to be really important. We were fresh and ready to dive into the experience capitalization process and at the same time, our ideas and plan was young enough to still be shaped by the collective efforts of the communities and people on the ground. This flexibility is so important when engaging in participatory processes.

For now, my work continues in Delhi. I am still grappling with how to work with all this new input and to make a plan that will ensure our experience capitalization process remains a collective effort. I’ve learned a lot so far and I am eager to continue learning as we complete the full experience capitalization process.

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“FRAMING” A CASE WAS VERY, VERY USEFUL

Gloria Nyamuzuwe
The experience capitalization process that we completed during the first half of 2017 changed the way I look at things. Now, when I collect information, I really ask myself: OK, what difference did this activity make – and why does it matter?

Soon after the workshops we had in Maputo as part of the training process organised by CTA, I went into the field to collect information for the final report of the project where I work. “I think we should do a capitalization exercise with the information we were collecting about the savings groups in different regions, and share it”, I told my colleague. Unfortunately, we were not be able to do this, as time would have been too short for it. Yet, the idea of “framing” a case guided my whole mission in the provinces this time. I was constantly asking myself about our impact, and about the difference our activities made for the beneficiaries, after all these years. What was the situation at the beginning, and what exactly changed since we started in 2004 – and why?

The essence of your story

I think that clearly identifying a case and defining what we want to find out, is crucial. In our work, we are particularly interested in the perspectives of the women. We want to look at the changes they perceive in their lives. Because in most of the places we have been working the houses are built from straw. But now women are building these “casas melhoradas” (or “improved houses”, built from concrete blocks and cement and roofed with zinc sheets). By joining a savings group, they are able to buy the needed materials. So the questions we are asking now are, how did you do it? How much money were you able to save and how much was left to get into business the following year – and how much you made then? And just as important: what motivated these women to continue saving?

Defining a clear goal for a field visit is important because, in practice, when you arrive at the community, people do not have a lot of time. So, this helps you to make more relevant questions, and this, in turn, prevents you from getting irrelevant answers. Framing the process makes easier to select the parameters and indicators that will lead to better questions, and therefore to much better answers.

I have been collecting a lot of information all these years, only to realise that it was not good to put it all in the same document. The way I see it now, I could come out with three types of different reports for the work we’ve done in each province, each one of them meant for a different target group. One report would merely relate what happened, and when – perhaps the type of stories that are more interesting for donors who only want to see what happened with their money. Another one would focus on the practicalities of the process, paying special attention to the perspectives of those in the field. Here is where I would use a lot of pictures, and also add the quotes of the women interviewed. For a third type of article I do not need to
use pictures, but rather say what other people are interested in reading: a description of the technical aspects, or of the protocols that need to be followed when implementing a savings scheme.

Looking back at the experience capitalization process we tried, I can say that I learnt a lot about framing and about the importance of having a clear focus. Not all the information that seems important to collect in the field is relevant, and it doesn’t need to be included in the final article. We always have the set of tables we prepared, and we can always write another article. This is why I think that in the next capitalization training workshop everybody should join the “fire talk” exercise like the one we had in Maputo, as this really helps. I wanted to, but I did not feel confident enough to talk.

But now I see that sharing the key elements of one’s experience helps one to distillate what is relevant and what is not. This way, even if slowly, the essence of your story is seeping through. You avoid the longwinded tendency many of us have.

At the same time, both during and after the workshop, it has been good to write the article together with one of my colleagues, because in this way you go through a similar process, discussing a lot while doing it. This is also framing. This may mean that the whole writing process takes longer, and that it stresses you more than when you write alone. You organise and filter all the information that is available, and you show a much stronger idea. When you write alone, you just do it.

A new set of tools

Going through an experience capitalization process has completely changed the way I look at things, and the way I do things. To be honest, the first days of the workshop were not very clear. But the figure that the facilitators shared, and the discussion we had around it, really helped a lot. And the tables we filled, they were very useful! I see myself doing the same thing in other situations. The whole process gave me a set of tools which I can now use many times.

I often follow what people are posting in the Dgroups, which I find to be very helpful. I want to learn more because I do hope to find an opportunity to apply this methodology again. Even though I might be leaving the project, I will find a way of completing a new capitalization process on it! There are a lot of opportunities here in Maputo. All I need to do is to collect information and organise it properly – and sit down and write.

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GATHERING INFORMATION – TEAM WORK AND FLEXIBILITY

Hari Sharma Neupane
I work as a Local Entrepreneurship and Institutional Development Consultant in the IFAD-sponsored Improved Seeds for Farmers Programme (KUBK-ISFP) in Nepal. Together with my colleague, Krishna Prasad Paudel, we joined the CTA-run training on experience capitalization in Goa, India. This has been a new way forward for us in reporting on our programmes.

I arrived at the workshop with very limited prior knowledge on the experience capitalization process, so for me most parts of the process were innovative. We learned about the concepts, and we started framing our own experience, which we wanted to capitalize on through documenting and sharing.

Sharpening our focus

The expansion of rural financing services is one of the key interventions in the rural areas of our programme. This is done through a cooperative approach to ensure outreach of rural finance for seed and livestock based businesses. We set up a number of cooperatives based on a model called Small Farmers Agriculture Cooperative Limited (SFACL). The programme team, including Krishna and I, decided to focus on women’s experiences within this cooperative approach to expanding micro-finance. The SFACL model includes awareness raising and capacity building amongst the communities identified in the programme. We partner with the Small Farmer Development Bank (SFDB) and the Nepal Agriculture Cooperative Central Federation Limited (NACCFL). We chose this experience because within the KUBK-ISFP programme we have had success with engaging rural women. Our approach could be replicated in other areas. We also felt that we have plenty of information to support an experience capitalization process for this experience. This was based on the fact that there is an extensive bank of data relating to all the SAFCL’s activities performed so far. But with so much potentially useful information, the question remains: where to begin, and what information is most relevant?

First, I made a distinction between primary and secondary information to be collected. Primary information is the information we will have to collect ourselves, and secondary information that which we can get from existing reports and databases. To collect the primary information, we planned to use different and complementary methods. The methods included focus group discussions, interviews with key informants, questionnaires, and field observations. The collection of secondary information is more simple and could be done from our desks. For instance, I requested our partners – SFDB and NACCFL – to send their annual reports and, where possible, also information from their databases. I didn’t expect any difficulties here because we already had a well established relationship with each other. As I was the lead facilitator of the process, I made a plan for the timing of information collection.

A team effort

Krishna and I could not collect all the primary information by ourselves. So, this is where other project staff and field trainers came in – we acted as a team.
We had already presented the essence of the experience capitalization process with the programme management team. However, the programme field staff and the field trainers knew a lot about the programme and had very good connections in the field, but they were not yet familiar with the experience capitalization approach. It was most important to make sure that all the field staff, including field trainers, understand why we were going through this experience capitalization process, and that they would feel comfortable with it. For this we planned a three-hour meeting with all project staff and field trainers to explain the process, its objectives, and their tasks. This was an important step to make sure that we would collect all the useful information. We thought that if the field staff understood the process, they would be better able to explain to other stakeholders from the programme, such as the farmers who are members of the newly established SEACLs, why we were asking them more questions. And, hopefully all of our stakeholders would understand that the process can be useful for them as well.

Understanding what experience capitalization is all about is not quite enough to make sure all stakeholders can share their opinions and experiences. Therefore we also tried to create an enabling environment. In other words, we had to gain trust. This is why we worked with the field staff who know the farmers to collect the information, and not with outsiders. Apart from this enabling environment we tried to ensure everyone’s participation. This explains why we wanted to use the different methods for collecting information mentioned above. My homework was to finalize the questions for the household surveys and the checklists that we used for the interviews with key informants and focus group discussions.

**Flexibility**

So far, I have not changed my ideas about the way we collect our information. In every case, the questions may need to be adapted if they are misunderstood. Or, the time schedule may need to be changed if we face practical hurdles in the field such as inaccessible roads. Flexibility is key to putting your plan into action! But it is crucial to have all the information collected and organized before a new meeting, and be ready for the analysis and the writing part of the process. The good thing is that there is always a new opportunity to put our lessons from experience capitalization into practice as the project continues.

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INFORMATION WE MIGHT OTHERWISE HAVE MISSED

Emmanuel S. Gbakie
I was officially introduced to the experience capitalization approach at a CTA-organised workshop for the anglophone countries in West Africa in Ghana, back in March, 2017. This followed up on a two-day meeting organised by a consultant in Sierra Leone a month beforehand. During the workshops our team was introduced to the methodology and saw how the experience capitalization documentation process differs from standard monitoring and evaluation. We also covered the concepts behind writing articles based on our work for wider dissemination to interested parties.

The workshop in Ghana improved our knowledge of the processes, and we joined the CTA Experience Capitalization network. We were charged with developing articles on topics based on our experiences and we decided to write an article on the establishment of Community Banks in Sierra Leone, as some of our projects were coming to an end.

The tables we compiled as part of the training process provided readily-available information. In fact, we were a little surprised about how much information we had about different aspects of the project that we might ordinarily have missed – gender issues, the changing climate, as examples – and all of this really helped us to identify areas of interest. We used the EC methodologies to see how best we could capitalise on what we learnt from our experiences.

**What’s different about Experience Capitalization**

The process differs from standard methods of monitoring and evaluation and knowledge management because the way the information gathered is tabulated. Beforehand, the documentation was done through different report formats for different audiences – now we have a standardised format to gather information, through tables which allow us to properly record our activities. We can go back and do thorough research in order to find answers by teasing out facts which might ordinarily have been hidden.

We found that we could use the activity logs to identify what we did that was good, and what was not so good; what proved to be unexpected challenges, and what we did to solve to problems. Importantly, finding this out proved easier than before.

Our previous reports were detailed, but too disparate. Now the difference is that, by properly analysing and using the information in the templates and tables, we no longer have to do things in an ad hoc basis. We can capture better information by writing more bite-sized pieces. So, this means that we are able to develop more readable articles, which are more informative and interesting to stakeholders. We are better able to interest our readers in what was going on and what we were able to find out.

This is the real difference – the EC methodology helped us see that we didn’t ask what was going wrong before. There were questions we weren’t asking, we didn’t really go on and ask why we were doing certain things, and why we didn’t achieve results. The tables really brought out the answers – we found that a lot of the information was already there but we hadn’t been asking the right questions.
How the methodology changed what we report

We decided to align our reports to the EC methodology, which requires us to ask questions that we normally wouldn’t have, and to tabulate information that we did not previously require. Once we filled the table, we were able to align it to some of our reports as an annex, and then we found out things we were a little surprised about.

For example, one unexpected result came from a table of information gathered on a project covering rural financial institutions in Sierra Leone. The project established community banks in rural communities. We had originally thought that due to the low levels of education people would be unlikely, or unwilling, to participate, but in fact there was an astonishing level of participation. We thought people would be somehow afraid of going to those banks, but after the project we found a very good turnout, because people had always wanted a service like this. People were very willing to participate in the scheme and take out our flexible loans because they were available without requiring any sort of financial or solid collateral. Farmers may only need personal recommendations from chiefs – this is a situation not offered by commercial banks – and they realised that the project was there to help them come out of poverty.

Equally, we also found that keeping staff at the banks was much more problematic than we had expected, with many more resignations than we were prepared for. From the information we’d gathered, we realised that this was due to the low levels of infrastructure available to bank staff – many were unhappy to have been relocated from the city to rural areas. So we constructed staff quarters on common land donated by the communities – in some areas people had to give up their land and we had expected them to resist this, but they saw the importance of what we were doing and how it was benefiting them. This situation was certainly unexpected but, again, we discovered this through the experience capitalization processes.

We are now able to develop more readable articles, which are more informative and interesting.
Developing the future

All of our new projects have to be based on what we have already done – to plan for the future requires a detailed knowledge of what we learn from the past. We have recently received the go-ahead to develop a new project and we will certainly use the information we gathered in a compendium of articles using the experience capitalization processes to design it. All of the documentation we have, especially the stuff that we didn’t expect to find, is now available and will be used to make sure we start off the new project with our eyes open – to see results which we cannot yet expect.

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WRITING FOR THOSE WHO’LL READ

Dirce Ostroski
An experience capitalization process is a short, practical, effective and simple process, and its final product is a document which is complete. It is possible to focus on activities within the farm of a single, small-scale producer, as well as to capitalize a broad programme involving, let’s say, 500 communities. This is one of the things that makes the methodology very attractive. Moreover, a capitalization process includes the analysis of both negative and positive aspects in a particular experience, and draws lessons from them. This brings us a step beyond the systematisation processes we are familiar with in the Brazilian Semiárido.

I was invited to join the workshops that CTA organised in Mozambique in 2017. My initial intention was to focus on the work of some lace makers in Paraíba, the state where I live, but this is part of a project which was only starting then. On my own initiative, I decided to look instead at the knowledge management activities which were part of the implementation of the IFAD-funded project called SEMEAR, which was then ending. I was very interested in looking at what we had done and achieved, even though this meant focusing on a six-year long programme.

Not surprisingly, I found it difficult to select which of the different interventions to consider – especially because I was aware that leaving things out was unavoidable. I had to make many decisions on my own as, when the workshop started, the SEMEAR teams had already been dissolved. As I was the project coordinator, I still had the task of delivering the final audit reports. But there was no one to talk to. In addition, the programme had spread across eight states, and the only way I found to gather additional information was to phone a few beneficiaries, and ask them for their opinions.

The merit of the tables

We were recommended to fill in a set of tables, as templates, and I did this with the information I had with me in Maputo. Like my colleagues, at first I was a bit reluctant. Why? Because it is necessary to make choices, prioritise some ideas above others, and discard the rest. Usually, we do not want to choose, and we want to put everything in every document we write. This happened to me too. And the other difficulty I saw was that I had to pick ideas that are strongly interconnected with each other, and to separate them between the different columns and rows in these tables. These two factors took me from my “comfort zone”: we are not used to dealing with information in this practical, direct way.

However, when it came to writing, I realised how useful these previous steps were: the tables are very useful as a guide. When I started to write a first draft document I had already gone through the difficult steps of separating, prioritising, and organising information, and it was much easier to go on. Now I see that it is easier to get out of the “comfort zone” and complete a document when you understand the purpose of those tables. They help us see what we know and what we don’t know. They help us see what is linked and what is not, and then it is also easier to add new elements – such as the information one comes across after a workshop.

For those who do not have the habit of structuring a text, writing an article can be very difficult. I think of people like me, working in the field: our documents
are often jots that have to be linked to become a running text. With this methodology, the tables help us to divide this difficulty into pieces. This is the merit of the tables. Then we look at each one of those small pieces and see what fits best into the text.

In fact, the importance of the tables only became clear to me after the second workshop we had in Maputo, when I was already completing the article. What had cost me most time was to decide what was necessary and what was essential. Particularly, I think that writing little is essential. We are nowadays bombarded by an enormous amount of information. To me, it is clear that the larger the text, the lesser its chances of being read.

**Determinants**

Once I had a first draft, there was almost no time or opportunity for comments. The SEMEAR team was not there anymore, and my IFAD colleagues would have needed more than 30 days to make comments – something which was not possible. The other participants were also under a great pressure of time.

So I made some decisions. When writing, I think it is very important to think for whom, and for which purpose, I am writing. I value simple texts because there are more people in the world who prefer simple texts, and who find it difficult to understand complex documents. If they are the ones who will be reading what we write, then we need to strive for simple texts. But I was also asked to prepare a document that would go to IFAD and to other organisations, and which therefore required a more formal tone. Although I personally prefer to be direct and practical; I sought a balance between the two styles.

I used quotes and photos to highlight the most important ideas. Some of the quotes in the final article came from those phone conversations. Yet, most of them I had collected throughout the process, as material for the reports (before I had ever...
Now that my document is ready, I see that the biggest difficulty I had was when talking about the negative results. I thought of completing a capitalization process. I believe that the examples and the statements I added in the final article are a dense summary of what I heard throughout evaluations and conversations. At the same time, the photos were already available, as they were made during the years of implementation of the activities of the programme. It is important to note, however, that if we had known we were going to be doing this, we would have also collected other types of information for the analysis, and we would have done it in a participatory way, in parallel with the day-to-day implementation of all activities.

Now that my document is ready, I see that the biggest difficulty I had was when talking about the negative results. Analysing the problems that have occurred is more difficult than analysing what went right. As far as I know, we do tend to focus only on those cases that have been successful. However, when you avoid touching sensitive issues—institutional ones in particular—you may miss the opportunity to draw key lessons, and to help others so that they do not make the same mistakes. You feel more comfortable to document the challenges when you dare to look at what did not turn out as planned—and then you draw the most interesting lessons.

Dirce Ostroski works as consultant for rural development and sustainable agriculture projects in Brazil. Her article, “SEMEAR no Semiárido: Coprodução de sentidos e saberes na convivência com o Semiárido brasileiro” was published in 2018.

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EXPERIENCE CAPITALIZATION

From theory to practice: Trying out a new approach
DIFFERENT PERSPECTIVES, MULTIPLE AUDIENCES

Fábio Santiago
One of the questions I was asked after the workshop we had in Maputo was if I could mention the most important lessons drawn from the experience capitalization process we started there. Looking back, perhaps the most interesting moment was when the combination of all the separate phases of the methodology made sense to me. At first we were separately deepening each step of the process, getting very specific bits of information and distributing it all in the tables we were using – only to put it all together again in one article. Actually, all one has to do is to follow a circular process, where the pieces are first fragmented and then merged as part of a whole.

But what I found most useful was that participants were all interacting with each other, and this is something which kept me alert throughout the whole process. Each person has a different purpose; each one puts it on paper differently. But we all worked beside each other, we heard discussions next to us, and we did peer reviews.

Learning together forces one to look through the eyes of the other. Of another person, or another country, for that part. It was very good to see professionals from Brazil and Mozambique coming together, because of our several similarities. We share similar climates, we were colonised by the same country and now share the same language, and have several similar socio-economic and environmental problems.

Encouraging participants to interact with each other is one of the key principles of the experience capitalization approach, because each participant brings his or her knowledge to the workshop, and to the process. Writing, drawing, recording, analysing a given intervention… in each of these steps we see an individual’s own perspective, as it is he or she who has to organise the information in order to analyse it better. But the added value of these interactions is seen throughout the whole capitalization process. One way or another, each one of the participants is present in your own process as well, following you step by step. In fact, it is as if somebody else follows you and helps you with each of the choices you have to make: do I include this piece of information in the article, or not? And if I do, does it fit here – or should it be added somewhere else? Talking softly to your neighbour makes it less likely to feel ashamed of the mistakes one is bound to make while learning. It also makes it easier to face the several “kill your darling” moments that inevitably come up. In this way, while the article gets shorter, we get sharper.

But because I wrote the article alone, my interest in having it as end product compelled me to appropriate all the steps of the methodology, and make them my
This may look like a contradiction, but then there are also individual benefits coming out of a collective exercise. This is particularly useful now for me, as I am working as an independent consultant. Given the shortage of professionals who are specialised in participatory methodologies, and in knowledge management in particular, I can also say that having gone through this process has helped increase my personal value in the job market.

**Breaking the barriers of knowledge appropriation**

Another advantage is that, involving different people in its different steps, the experience capitalization process creates a horizontal space, and therefore helps us reach a broad, non-selective audience. As consequence, the resulting products (as articles or documents) help break barriers in terms of knowledge appropriation, reaching diverse audiences with diverse types of knowledge: from the small producer in the rural areas to the project managers and academics.

An experience capitalization process is a very strategic tool for the individual professional, while it allows organisations to reach actors at all levels. Another great advantage is that it helps creates linkages with other knowledge management initiatives, as well as with the necessary monitoring & evaluation steps taken within an organisation.

I am convinced that, by generating a horizontal process for sharing knowledge, this methodology helps increase social capital in the rural areas, and also within organisations. In other words, because of the potential of accessing a broad public, experience capitalization may become a very suitable tool in rural development and the fight against poverty.

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FORGET PERFECTION! PRACTICE HELPS WRITING BETTER STORIES

Mersha Yilma
I have been collecting data from the field and writing stories for more than 15 years. But the stories I write these days are different from the stories that I used to write when I started as a communications practitioner. Today’s stories are better. Or at least I thought…

My opinion changed a lot after I joined a story writing and documentation training organised by the Netherlands embassy, CTA and Guava Stories in Addis Ababa, Ethiopia, in September 2017. One of the biggest lessons I learned from this training workshop was that I have been writing stories in what can be referred to as a “traditional way”, and that, as a result, they may not have been as good as I thought they were. The other lesson I learned is that I should continue practicing as this is the best way to improve the flavour of my stories – even if I never get to be the best storyteller ever. Writing is a complex process, if not a complicated one, but it is something that we can all do.

A few steps and suggestions

Together with my fellow trainees, we learned that the first step is to ensure a conducive environment, or one that puts us in a better position to write. This includes, among others, having the necessary time and resources (especially in terms of information), together with the necessary support of our colleagues and of those directly involved in the case we want to share. Equally important is to have an open and critical attitude toward this case. After making sure that the necessary conditions are met, we have to identify the golden thread of our story. This is what some people call the “unique selling point”, or the idea that will make our readers remain interested in what we are saying, and that the main points we share remain fixed somewhere in their minds. Otherwise, we bear the risk of wasting our time, resources and energy writing something no one will pay attention to.

Then the next step is to set the boundaries of our story, as it is practically impossible to cover everything related to one project in one story; we also noted that being brief and precise is one of the best ways to get the attention of our potential readers. And after setting the boundaries, we have to organise the content, with information which can help us build an introduction, a description of the context and of all activities, the analysis, conclusions and recommendations. The best way to do this, as discussed during the
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training, is to organise the information we have, using a set of tables or templates.

The core and the most demanding part of this process, as I witnessed, is the analysis. The analysis part of our story is where we present new ideas, and where the readers get the gist of what makes our case different and therefore interesting. It is the part where we tell our readers what we have achieved with the implementation of a particular project, with indicators showing and helping explain the results we have seen. Or, in other words, showing what were the main limitations or drawbacks and what were the factors that contributed positively. A good storywriter needs to dwell on this part to convince the readers by providing evidence of what he or she is saying. This is the part that makes our stories different from all those reports that focus more on describing situations, and which most of us find easier to do. The main objective needs to be to generate new knowledge and share it, rather than describing actions and events. The analysis helps us show clear conclusions and also recommend specific steps to improve what we’ve done.

As someone who writes stories regularly, the workshop we had introduced me to a new approach that helps me look back at the way I have been writing stories and at how they look like, and also to focus on what I need to do to improve the texts I share in the future. I realise that a week is not long enough to cover all the steps that are needed. But I think that as all trainees already had some writing experience, it was possible to share ways of improving our work, and explore how to go about it. After all, in my opinion, this is the purpose of a training workshop: learn new things, follow some of the recommendations given by others, and keep on practicing. Every trainee had the chance to write a story about a project being implemented by his/her organisation. The peer-to-peer review of all stories, something we did the last day of the workshop, showed that everyone is on the right track, and helped us focus on the uniqueness of each case, and on the best way to engage our readers.

We may never be perfect..

One of the things I liked most was the comment made by one of our fellow trainees at the end of the training. He said he considered himself a good storywriter, and that he thought he was going to learn how to write a perfect story. “But I came to see that I will only write better ones”. I totally agree with what he said, and I am happy with that. The training workshop was an eye opener, helping us see that the stories we have been writing were not as good as we thought they were, and also helping us see that we may never reach perfection. We may never be perfect. But we can always improve what we do, and practicing is the best way to learn. We have permanent opportunities to do this.

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EDITING STARTS BY ORGANISING INFORMATION

Marta Rocha de Araujo
A couple of months ago I was invited to join a group of participants starting a capitalization process in Maputo, Mozambique, and to help them edit the texts they were preparing. I had read many similar articles coming out of previous workshops, but I had never followed such a workshop myself before.

Looking at what they were doing, my first question was if I could ever be sure that all the needed information was in the texts which I was to help edit. The answer I got was that we needed to “make sure the tables contains all the information” – a reference to the templates used during the exercise, and to the different “moments” in which the workshop (and the process) was divided. But these could be very, very long, or so it seemed to me. And if everything was in them, how to make a text out of them? Several participants shared my fears…

A couple of weeks after the first workshop, the first drafts started coming into my mailbox. Some were very good, but they were all very different. And so the question I had before starting this assignment came again: is all the necessary information included in them? I thought I needed to answer this before seeing if all the sentences were in the right place, or if the thoughts were clearly and correctly formulated. In other words, before I would start editing them. So just as the participants had been told, I went back to the tables they had prepared during the workshop, and very soon I started to have doubts. How to make use of them? How to put all the information available together? And how to see what belongs to each chapter or section? This is when I grabbed a stiff cup of coffee and my colour pencils, and thought of the figure on the next page.

Chunks and pieces

Looking back at the tables in detail, I saw that what I had been told was true: the necessary information was all there: in the tables with the boundaries of a case, the description or the analysis. But this was not evident. So my first idea was to try to group the information collected for each case, dividing it into the big “chunks” which roughly make an article:

- With the introduction we show what are talking about, and also emphasise why is it important – and for whom. Some participants were talking of their USP, or their differential.
- Next, we present what happened, considering where, when, who, what, and clearly showing the results achieved.
- The largest part of the story, or the analysis, is where we select the way we will look at what happened (choosing parameters and their indicators), and we show the reasons why this happened.
- Last come the conclusions, as the key points of our story. This is where we include the main lessons and recommendations.

Above all, it was important to remember our interest in drawing lessons – and that finding lessons implies looking at reasons, more than at facts. This is necessary if we are to support a general monitoring and
evaluation process, or if we want to share ideas to inspire others and to encourage them to start similar initiatives. The analysis, any analysis, depends on the context in which this experience takes place. The context is part of and includes the political, financial, environmental, historical, social and even the organisational setting. These settings will determine the way we judge the results, labelling them as “positive”, “negative” or even “unexpected”. And it is here where one finds the factors that influenced the outcomes.

Looking back at the objectives of the project and at its beneficiaries can help us improve the analysis and, therefore, to draw better conclusions. This is clearer if we pick a sentence like “The weight of the fish raised from an average of 65g to 250g, due to the supplements of imported animal feed.” A team from an ecological production project may see these results in a very different way than those fighting malnutrition – or the fish farmer. And all are correct.

**Back to Maputo**

A few weeks after the first workshop, we all met again in Maputo, as the second part of the capitalization process started. After a general introduction, I presented the diagram I had made, and this was well received by all participants. We had agreed to have a final version of every article for me to take home by Friday afternoon, so everybody wanted to write and write. But it didn’t work as we had hoped. On Thursday morning, a delegation of participants asked me to discuss the chart again.

So we went back to the general ideas we had talked about at the beginning. We looked at the tables everybody had been filling in together, and discussed the need to consider only the most relevant information. A general discussion of more than two hours helped us all share our doubts and ideas, highlighting the main purpose of an experience capitalization process. Not long afterwards, the essence of the approach was brilliantly summarised by one of the participants: “I thought I came here to tell...”
what I did. Now I understand I have to tell *why.* What we needed was to make use of what we had: a set of tables with different parts, all of which contribute to the analysis.

Then I realized I had built the chart and the presentation following a different logic from that of most of the participants. So while the first version of the diagram will remain in Portuguese, I made a second version in English. This second version, most certainly not the last, is an attempt to show the shortcut to the analysis. The diagram became slimmer; the name of the tables are translated in colours and presented in the legend. And I made some additions. For example, the objectives of the donors and of our own organization also shape our story, so they also got a place in the schema.

The final versions of the texts written by all participants at the capitalization process in Mozambique show that we all learnt a lot. Especially from the things we had to do again!
SHARING AS A FIRST STEP TO MAINSTREAM EXPERIENCE CAPITALIZATION

Anthony Wanyoto
Experience Capitalization goes beyond writing success stories. You have to critically reflect on your project, and also write down why things didn’t turn out as planned.

At the Vegetable Oil Development Project in Uganda, under the Ministry of Agriculture, Animal Industry and Fisheries, where I work, we strive to share outcomes from our projects with the broader public and with other ministries. We do this mainly through our website. I am the communications and knowledge management officer for this project, so sharing and messaging is particularly important to me.

Over the past ten years, the Government of Uganda has been involved in the development of the vegetable oil sector with the support of the International Fund for Agricultural Development (IFAD). In my capacity as a communication officer, I went with ten colleagues to meet others working on IFAD projects in the experience capitalization workshops organised by CTA in Kigali, Rwanda. Here I documented how a farmers’ cooperative got involved in producing and marketing oilseeds. In short, through the project, the people in the cooperative received training on production issues and group dynamics. Partnerships with industry and banks were established, and with their first profits, the cooperative invested in storage and post-harvest equipment. The experience capitalization process helped me to describe the project, the challenges faced, the innovations, and the impact it had on farmers.

An opportunity to share

I seized the opportunity to share my experience because I believe that a similar exercise should be a part of all IFAD projects, and of all development initiatives.

In May 2017, the IFAD Regional Implementation Workshop brought together policy makers and development practitioners involved with all of the IFAD-funded projects in eastern and southern Africa. The workshop theme was financial inclusion for rural transformation. It was the first time I was invited to join such a meeting, and I was looking forward to the networking opportunity. Besides the main theme for the workshop, breakout sessions were organised, and I was keen to participate in the one about experience capitalization.
I started by putting up A2-size posters at a strategic point in the hallway of the workshop venue. This way, when people were on their way to the breakout sessions they saw my posters. My posters clearly outlined the steps one takes when doing experience capitalization. I illustrated these with my own experience with the process by showing the different types of information I had collected, analysed and organised for my story about oil seeds. Viewers of the posters were taken, step-by-step, through an experience capitalization process.

Besides the posters, I had copies of the finished product, my story, to share at the workshop. Both the posters, and my story were useful during the breakout session when I explained what experience capitalization involves. Amongst the group there were people from different ministries, the private sector, farmer organisations and IFAD staff, most of whom had never been exposed to experience capitalization. Some were enthusiastic afterwards, some were still a bit hesitant. The latter told me that it sounded like a good process, but that it was not completely clear how to use it in practice. I take their hesitance as a continued challenge to keep promoting the value of experience capitalization, but also to expose as many people as possible to the methods and the art of the process.

**Organising in-house training**

Convincing people that it is worthwhile and teaching them how to do it are two sides of the same coin when it comes to mainstreaming experience capitalization. I have also taken up these challenges with my colleagues at the Project Management Unit.

If experience capitalization becomes part of the regular Monitoring and Evaluation (M&E) sessions of a project that we already engaged in, it won’t be too time consuming. This is why I decided to convince the M&E team to incorporate experience capitalization
Convincing people that it is worthwhile and teaching them how to do it are two sides of the same coin when it comes to mainstreaming experience capitalization.

into their planning. But with this change to the way we want to work, we also need the knowledge and skills to match. In order to get everybody to reflect on their work in such a detailed way, we will have to start by training ourselves in the office.

I presented my lessons learned in the workshops in Kigali and Arusha to my colleagues and they responded enthusiastically. One of my key messages was that experience capitalization is not just something for communications officers. And, involving and training as many people as possible does not have to be costly. The FAO online learning module is free of charge, and you can follow it at your own pace.

So far, three coordinators in our office, who are responsible for the Vegetable Oil Development Project, will be trained in experience capitalization at an appropriate time. I will ask the project manager to ensure that we include training on experience capitalization in our plans for the next financial year. With this, I hope to train another 10 to 15 project officers. As a communications and knowledge management officer I will be available to assist my colleagues with the whole process, including the writing part. When experience capitalization is a team effort and not just an issue for the communications officers, I am sure we will have plenty of interesting and “all inclusive” stories to share.

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A LONG-TERM PERSPECTIVE
ADOPTING AN EC APPROACH IN BHUTAN

Karma Wangmo
My first introduction to the experience capitalization approach came out as a blessing; I was in dire need of a concrete, or at least, more structured system to guide my documentation process. When I started on the exercises in the workshop organised by CTA in Goa, I had been writing several case stories. But, because I didn’t have a proper framework to guide me, I’d left much of my work half-finished. I was unhappy with it; it was incomplete because most of the papers I was writing were started on an ad hoc basis, somehow unplanned, so their quality was compromised.

I used to think that reporting was only about capturing successful stories, positive lessons, or productive experiences. I also never pictured the target audience in my head when I was writing, and didn’t really plan what I was trying to disseminate. To be fair, I found writing to be a tedious process. Consequently my writing was plain, unsynchronised, and uninspiring.

The effects of an Experience Capitalization workshop

However, my entire understanding of the purpose of writing changed once I was introduced to the different steps which are part of the experience capitalization approach. I learnt many things at the workshop. The most prominent of these, in my opinion, are the clear steps, or processes, which one can follow to create a well-articulated and interesting document. It is with pleasure that I admit that I can now follow the capitalization steps – such as setting the objectives, selecting the case study, setting boundaries, gathering information, organising the information, analysing, and concluding – and my reports are much easier to write and, dare I say, more satisfying to read.

Similarly, through EC, I now understand that it is equally important and valuable to capture those cases and activities which didn’t turn out well; writing up these experiences means that others can avoid similar outcomes in future activities. Moreover, I don’t find it difficult to write up our experiences anymore. The EC process is clear: my work heads in the right direction from the start. In fact, I now make a note of every little thing, no matter how apparently inconsequential, because often the consequences become apparent later. I credit this new practice to EC, and the team of facilitators at the workshop where I learnt the various techniques I now use.

How it differs from standard M&E

In the past, Monitoring & Evaluation in our country has been all about “facts and figures.” We had to concentrate on gathering and reporting the data, and the data, and then more data. Standard M&E is generally concerned with the quantitative information available; the number of beneficiaries, or the length of the irrigation network, the area under citrus cultivation, and so forth. It only records the physical coverage of any activity or an intervention. My personal feeling is that standard M&E lacks something when it comes to capturing the essence of a project or event.

I think that Experience Capitalization is the best approach that I’ve so far discovered to address these shortcomings. With EC, the raw data is better analysed, which gives it more weight: where you
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previously had only simple facts, you now have explanation. As an example, an M&E report might report that a total of 50 farmers can access irrigation water after a project. We can now highlight whether those 50 farmers are actually deriving any benefits; or how the water has affected their livelihoods; and so on.

**Adopting processes and approaches in my organisation**

Honestly speaking, my colleagues and our organisation haven’t yet been able to institutionalize the EC approach that we’ve learnt. This is because new things take time to be adopted – especially when it comes into writing and documenting. Many of us find that report-writing is a difficult habit to get in to; this may be due to a lack of a culture of proper writing, or not having a standardised system, which makes it difficult to balance reporting with the fieldwork we do.

Here in Bhutan, for example, more people are responsible for implementing projects and only a few are asked to write and share the results. Sometimes it can be a bit challenging to train colleagues in new trends, or new philosophies of writing, when they already feel overwhelmed by their other responsibilities.

However, a journey of a thousand miles starts under your feet – and we are slowly making progress. Our field staff and some of the office-bound project implementers are gradually getting to grips with this new trend in informative writing. I am hopeful that within a year, or two at most, EC processes will have been institutionalized in our organisation. Right now, we’re only talking about baby-steps. But I will be on hand to help anyone who wants to know more about the processes, and they’ll be able to rely on me – and my own work-related writing will highlight EC processes. It is a great concept for promoting and capitalising on any experiences, lessons, and teachings.

**The way forward**

The adoption of Experience Capitalization by our organisation is, like many new techniques, catching on slowly. We are planning new ways to encourage the adoption and institutionalization of these processes. We are implementing an annual “writeshop”, where all the field staff will get together to write stories about the work they are doing and, importantly, about the people with whom they are working. Ultimately, our organisation will adopt these well-founded principles, and we’ll write informative and illuminating reports and stories: and I am grateful to CTA for introducing me to it all.

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“WHAT AM I GOING TO DO TO MAKE THIS HAPPEN?”

Susan Watkins
After attending the workshop organised by CTA in Accra, I was able to explain to the programme staff in my organisation all the basic concepts and what the value of an experience capitalization process could be to Canadian Feed The Children. Following that training, I decided the next step would be to choose people who could help me start the process of bringing it into our normal monitoring and evaluation processes.

I chose the people who were most likely to be doing this kind of work routinely, and asked them to go out and do a trial, to test out this new approach to gathering qualitative data.

We went out to one of our local communities and interviewed a group of women beneficiaries about what Canadian Feed The Children had done to give them access to savings and credit opportunities. It’s really essential to understand the challenges faced by women and how they overcome them so that we can change the way we run these kinds of interventions. We asked the women what the intervention was about, and what had happened afterwards. They were asked to think about its meaning and how it had really affected their lives or indeed changed their lives.

Following that, we wrote an article on how the process worked and came out with some interesting innovations that we could replicate in future. They weren’t totally unexpected but I don’t know if anyone has ever written them down before.

Institutionalizing the process

Not everybody, or every organisation, can devote the time to go through a complete training process. But I see this training as the beginning of something that is very important. It is worth putting in the time to pass on the information. It’s better to learn by discovery, but the basic information can be communicated quickly.

The experience capitalization approach is not so wildly different to what we already do when we gather qualitative data – we interview people in focus groups and try to get a range of information. I think that Canadian Feed The Children definitely has those skills, but in the past we’ve gathered a lot of qualitative data and sometimes we don’t really handle it well because it can be bulky and a bit unwieldy for analysis.

However, through the experience capitalization process people are actually bringing to the fore the highlights of the intervention: you don’t have to sit back and think, “Well, what does this mean?” because that is what the beneficiaries or actors are telling you. The information is there, and this is what makes the analysis part easier. I think that, going forward, I would like my NGO to use this approach, just so we get to the next level faster and share those experiences more widely. A lot of organisations have done similar savings and loan interventions, and we’re all learning.
Each one of us thinks about how to massage the available models to better suit our objectives – some of the things people are coming up with are really revolutionary, and if these approaches were better advertised I think they would be adopted faster.

**The beauty of being the leader**

I was thinking that it’s the people that are sent to these trainings who are the key. In my case, I am a decision-maker-practitioner so I’m very interested in the field-work, and I’m very hands-on. As “the leader,” when I hear an idea or I see something useful, I can apply it to our work locally – bring it back to the office and train the staff. People who are more concerned with overall policy may not react instinctively to adopt such a new, field-based practice.

I am one of five country directors who report to a Head office. I believe that the other Country Offices will see, as I do, the value of the experience capitalization process. Now, in order to institutionalize it, I will have to convince the Head Office that this is the model that we should choose and apply as an organisation.

I realise that I will also need to get the monitoring and evaluation staff on board. Sometimes people see no need to step into the brave new world – because they believe that theirs is the most brilliant approach and that there’s no need to change – but life is change and adaptation is survival.

I think that we could send a short training video to the other offices, and then they can ask questions. I’d make myself available for questions and advice. Someone could ask, “Oh, I saw this in the video, what was that about?” and with the training material CTA has provided they could get a deeper understanding of Experience Capitalization before we moved on to a formal, organisation-wide training.

Once that’s done, I think that it will be easier to institutionalize. Can I convince the Head Office that this is the model to use? Yes, I don’t think that I’ll face that great a challenge. I was able to train the full country programme staff, about 50 people: they understood what I was trying to explain in less than two hours.

**The way forward?**

I don’t think it is a great leap from Canadian Feed The Children’s current approach. I think that we’re well positioned to take on Experience Capitalization. The processes are enlivening and entertaining, and adding to what people already do is a good foundation.

The workshops worked well and I think that the good ideas came out. But to change processes institutionally you have to be progressive and yet dogged at the same time: you can’t just imagine that it’ll happen overnight, you have to actively think, “What am I going to do to make this happen?” We’re a small organisation, so I wear many hats; a leader, and a practitioner as well, which is a great advantage to scooping up Experience Capitalization and running with it.

Based in Tamale, **Susan Watkins** is the Country Representative in Ghana for the NGO Canadian Feed The Children organisation. She wrote an article with the information collected during the workshops organised by CTA in Accra in 2017. This article, written together with Grace Biniyam, was published in 2018.

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WE LEARN THE MOST FROM THE CHALLENGES WE FACE

Messias A. Macuiane
I was one of the participants who joined the experience capitalization workshops in Maputo in 2017. I was chosen to join because, as the only M&E officer in the ProAQUA project being implemented in Mozambique, I am also responsible for knowledge management. It was good to get an invitation, but before I went I had to do an Internet search. To be frank, I did not know what “experience capitalization” was all about, and I thought it was necessary to get a clearer idea if I was to make the best of these meetings.

The methodology has an enormous potential to adapt and upscale interesting practices – that much was clear to me from the beginning. I discussed this with the project coordinator, and also asked the opinion of some of the extension workers in my team, thinking that we had to make sure that an experience worth sharing would be selected and then used as part of this process. Unanimously, we decided to look very closely at the work done by a very innovative producer. We all thought this was a case worth telling, but which for different reasons had not been written yet. The capitalization process gave us a nice opportunity.

ProAQUA gives all the fish farmers with whom we work the same starters’ toolkit, and the same basic information on how to open a pond to start producing. But once in the field, you encounter many different topographies, and farmers find it difficult to adopt our recommendations. Our basic advice is to dig part of a slope, and then place the soil which has been removed on the other side, creating a tank. While moving the soil, farmers are to add a water inlet on the top, and an outlet pipe on the other extreme. Later, whenever you want to drain the pond, you just have to open the outlet pipe.

But when you go to Gondola, in the province of Manica in western Mozambique, you find it to be a valley: the water seeps from the ground, and streams by. If you want to dig a pond, you have to be creative. Our man was, and his approach was simple. “You need to make three sections, whereby you start digging inside and then keep moving to the right and to the left”. I thought that if we could share his ideas with the other farmers living in very similar areas, they would also find out that digging a pond is not such a difficult task. Actually, I thought we also had to share this knowledge with our extension workers, which is why we chose this case for our capitalization process. But in our region men do not easily share their knowledge and ideas with others. Our man was different, as he was willing to do it. Besides, he has already involved his wife and his family, and showed that he is very innovative. To me, he was already busy with experience capitalization!
If you do not include the capitalization process in the planning process for a whole year, you are bound to misuse the resources and the time that you have.

**A challenge for M&E officers**

M&E officers are the ones who should know when to run the activities which make up a project. But how to make an experience capitalization process fit with all the activities that are already planned and in process of being implemented? You know beforehand that it will not just be those eight days attending a workshop. One needs at least a few days before the workshop, some days in between, and at least four days to get the article written, edited and reviewed.

If you do not include the capitalization process in the planning process for a whole year, you are bound to misuse the resources and the time that you have. Or that you do not have, actually. This is crucial, especially in my situation. I am a project employee and not a civil servant; and besides, there are only a few staff members in ProAQUA. The knowledge I am helping to manage has to remain here, because might I go.

I thought that completing a capitalization process was just writing about the good things that are happening in the field, or about the reasons behind our success. I guess that this is because we are used to work towards achieving the goals of the project, which are measured by its indicators – and report this success. In this way, choosing the right parameters and their indicators for a more detailed analysis has been an enormous challenge to me. Unfortunately, due to a lack of time, I had to complete the analysis on my own.

M&E officers are at the heart of every project, know all its indicators and assume that things will improve when we reach them – not realising that all those factors which prevent us from reaching our goals are also useful, and can help others not to repeat the same mistakes. As a fish farmer told me recently, “one learns the most from the challenges we face; struggle is part of success. The first fish pound is small, the banks are not well balanced, but the second, the third start looking like the model we get from the project”. We know that the difficulties that farmers faced in Sussundenga when digging their ponds have to be shared. Once they are written, they can be shared with many people, and help them replicate what others have already done. Here, at the district capital, we are aware of the importance of upscaling fish culture. But for people in remote areas, where the tractors cannot come, or they cannot afford it… this approach has many benefits. Sharing the lessons of this innovative method of digging might also be the way to convince policymakers, and ensure that they provide their support.

**Finding a convincing message**

At this moment I am working on a new capitalization process, focusing on the distribution of starters’ packages, and proposed colleagues from the Planning departments in the provinces of Sofala and Manica to join us. These packages are important for the farmers to start digging their ponds as fast as possible. Equally interesting is the acquisition of the fingerlings to stock these ponds. So I have to allocate time and people for this capitalization: to analyse the good and the bad things around it. Furthermore: to show my organisation how important it is to share lessons.

This is going to be useful, because our experience of sharing with local people and with the policymakers in Maputo has not been easy. For example, ProAQUA distributes fry only once, but the projects which worked before in the same region did this on a continuous basis. If the project distributes only males
and we expect the fish stock to grow, it is clear that we need to do things differently — especially if working with innovative farmers. At the moment, the extension workers have difficulties explaining what we do to the producers, and we have the problem when explaining it to the policymakers.

The experience capitalization process has shown that we are not used to look at what went wrong, or to learn from mistakes. It is our task to share what we learnt from it. A complete knowledge management approach can help us, but we have to realise that if you only look at what can be called “success”, then it will be very difficult to draw lessons and to improve what we are doing.

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WANTED: A FERTILE SOIL FOR OUR SEEDS

Edson Natha
The planning process of a new capitalization exercise should start by looking in detail at the exercise we just completed. Now, if I am to reconstruct our participation in the experience capitalization workshop in Maputo, I have to start by saying that during the first few days it was very difficult to see what we were doing, or to see what we had to do.

I was there with two other members of the PROMER project in Mozambique: like all other participants, we brought a “success story” with us. Following what we were told before the meeting, we were ready to “learn how to align and refine a text.” We had not realised that the purpose of the workshop was to learn about an approach that can help us avoid future mistakes. Perhaps if we had known, we’d have raised other questions.

We were sure that we had completed what we had to do, until the tables that the facilitators shared forced us to look at what had gone wrong in our project. Guided by their step-by-step explanations, we started to focus on what had really happened — and soon saw that the tables were showing something rather different from what we had in our original texts. When we first started writing we did not consider everything we saw in the field, we never got beyond the positive things. So we left our texts aside and started new ones — somehow feeling that we had wasted some time.

The objectives of a capitalization process, and the materials that participants had to bring along were unclear; most participants (or their superiors) understood different things. And the first four days did not help to clarify it completely. The documents we got describing the methodology contained words that generated confusion. We could have escaped these misconceptions by avoiding terms like “success stories”. Looking back, we should have given this workshop a different name. In a capitalization process we analyse what was planned and went well, together with all those steps which were planned and did not have positive results, leading to lessons that can be used in the future. This is why I think that words like “learning” and “sharing” should have been highlighted.

A critical review

Finding the time to write between the two workshops was an enormous challenge as we are all under a heavy work pressure. Some of the participants thought that it could have been better to start working individually, converting the tables we had all filled in into a first draft text during the first workshop. I have no answer to this; all I have are some scenarios to consider. But I do think that it would have been very useful for us to try to do this before the end of the first week – either individually or working in groups — and then to start the second workshop with the same exercise. We could have done this in the same way as we worked at the end of our second workshop in Maputo, when we had a “conversation round” which was very effective.

Between the two workshops, participants could have looked for more information and improved the first drafts we made.
At the same time, it may be worth considering having a five-day workshop to fit all this, or it could also be good to reduce the theoretical presentations during a four-day programme. In my view, the learning process would be more efficient if one would start with one of the cases brought to the workshop, linking the presentations made by the facilitators to it in a better way.

But we can also look at the specific sessions. The individual talks we all had with the facilitators (in what we called both “the kitchen” or “the bar”), helped us to focus on our case, and to formulate the key ideas that made it worth sharing. On the other hand, the “campfire” session was also very useful, as it brought everybody together. This was the moment when the facilitators encouraged us to share our own ideas, and when we learned about the other projects/programmes that were being capitalised. I am sure that this interaction made us all ready for a future exchange of ideas and information: the ice was broken.

A very positive aspect of the whole process was that the facilitators were Portuguese speakers – the participants were unanimous about it. Most workshops – where large resources are invested, like in this one – are offered in English. But in English, this workshop would have never had the same impact. Since it was in our own language, we are already disseminating the lessons we drew.

**Trying it out back home**

When I came back from the workshop, I had the opportunity to share the capitalization tools we got with my colleagues at the Monitoring & Evaluation department, and also with some technicians. These tools have made it easier for us to write “success stories” (all our quarterly and annual reports must include at least one of them), but to do it in a better way. We used to do it in an ambiguous way, with no structure ... but by using the tables that the facilitators recommended we are able to position ourselves, focusing on what is it that we want to do, why do we want to do it, who do we want to include – and who will be the readers of each story. The different examples that we brought from the workshop and that we shared with our colleagues really helped the whole staff to understand and to learn.

Equipped with this knowledge, we promoted an “exchange of experiences” session between members of a cooperative of traders that had seen a lot of success in facilitating marketing links, and other traders outside the programme. These traders have serious problems with some foreigner merchants, who buy directly from the producers on their own farm. Very often, these small players work with large companies, but work without a government license. The problem is that they distort the market. Sometimes the maize has not even dried yet and they are already trying to buy it – for great discomfort of the large traders who want a long-lasting and more efficient relationship with the communities.

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Facilitation has to start long before the workshop, whereas at the workshop we create together a new body of knowledge – and political impact.
We recorded together how they were operating before, and how the cooperative regained control of the market. It was a practical adaptation of the capitalization tables. Both my colleagues and myself realised that to speak exclusively of one aspect at a time has a strategic, persuasive effect. The traders “saw” that they have had marketing problems, and recognised how, with the support of the government, they were able to work together and overcome these difficulties. Now we are already working on a report of this experience. We hope that a district manager, or perhaps someone working for the government, will read our report and realise that the situation has been controlled and that this is an approach which is worth repeating.

**Political dilemma**

Our own “experiment” with the capitalization approach showed another important point to consider when starting and facilitating such a process: the choice of participants. For me, an experience capitalization process should be run by the project coordinators, or by those who are responsible for the management of the programmes that they have to disseminate later. A monitoring officer does not have this mandate. The space to manoeuvre for our team is limited, as it seeks information, evaluates it and then delivers to those who have the decision-making power. Playing on less favourable outcomes is quite sensitive. Only managers can decide how they want to get the information and to whom it should be sent: dissemination as such has both a technical and a political cost. Therefore, the selection of the case to be analysed should also be taken by the project managers. This is not to say that they would be on their own.

We need to include those who know what was planned at the project level, what went well, and what went wrong. But in the end, it is the project managers who have to make sure that the capitalization seeds fall in fertile soils.

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Country: Mozambique
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Date: March 2019
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THE END OF A PROJECT IS JUST THE BEGINNING

Nelson Tukundane
Learning from experience. That’s what it’s all about. My first experience capitalization workshop in Nairobi changed the way I want to work. As a representative of the Uganda National Farmers Federation (UNFFE), I was given the opportunity to participate in a workshop organised by CTA for members of the Eastern Africa Farmers Federation (EAFF). During this workshop, I realised that our own experiences count, but also that I could learn from other regions in the world, and even, that others could learn from our experiences! How to capture the challenges, replicate the successes, and avoid making the same mistakes – these were some of the questions we addressed.

In this first workshop in Nairobi I focused on my experience with a project on village loans and financial literacy training with youth. In this project we used a simple approach. Based on a model from the International Labour Organization, youth were trained in financial literacy and entrepreneurship. This training was a good way to introduce the Village Savings and Loan Associations (VSLA) approach, where youth groups that invested in agricultural activities were formed. We provided training in business plan formulation, training in the agricultural value chain, and coaching on group formation and leadership. A total of 50 groups were formed to experiment with their business plan and the VSLA approach. Amongst these, two outstanding groups came up with excellent business plans, and they received start-up money to pursue their plans. As well as these, a large group that didn’t receive initial funds also managed to make inroads with their business plans.

Through these sessions of trainings, young people realised that agriculture wasn’t meant for the poor, but that they could engage in different enterprises at different levels of the value chain to earn a living. Pineapples and vegetables were grown, poultry and piggeries businesses were set up, and some were involved in processing or trade of agricultural products. Apart from an increase in income of these young people, we also noted it had a positive effect on the environment. Those who followed the trainings found alternatives to cutting trees for their livelihoods. We also witnessed the introduction of more sustainable agricultural practices.

During the workshop in Nairobi, and in the time after the workshop, I analysed the project and it made me realise that the simple approach of training, forming VSLA groups, and follow up, was one of the reasons why the project was so successful. Apart from successes, I also analysed what went wrong and why. For example, we were promoting piggery projects, and this discouraged Muslim youth from participating. The realisation that we could learn a lot from a project, and share these lessons with others, made me a real “ambassador for experience capitalization.”

How to keep learning

It would be a waste if we don’t capitalize on the experience from other projects run by the Ugandan Farmers Federation (UNFFE). We have so many experiences that we could learn from. For example, before the youth project we also had a project on financial services for poor farming communities. We could have integrated the lessons learned from that project into the youth project if we had taken proper account of the lessons learned. If we want to take the
If we document these experiences and recommendations properly, we can improve the implementation of future projects, both at the national and district levels. This is why I started lobbying for the institutionalization of the experience capitalization approach.

I started by creating enthusiasm for the process at the donor level. During one of the project meetings we were questioning what worked well and what didn’t work well during project implementation. At this moment I asked, “what is the best approach to capture the answers to these questions?” That is when I introduced and proposed the concept of experience capitalization, and explained what benefits we could gain from such a process. We followed up with e-mails and phone calls, and in the end USAID freed up a

The realisation that we could learn a lot from a project, and share these lessons with others, made me a real “ambassador for experience capitalization.”
EXPERIENCE CAPITALIZATION

From theory to practice: Trying out a new approach

project officer to work on experience capitalization with me, and committed to allocating budget for this.

For successful mainstreaming of experience capitalization we also need willing and enthusiastic participants. A few months ago we had a workshop with the District Farmers Associations where I was given an hour to make the case for experience capitalization. I explained the process and how we could benefit from it. I made sure to explain that it is not very complicated. By the end of my presentation, many leaders and members of these associations expressed that they were ready to participate.

But only donor support and project participants is not enough to really embed the process into our work. We also need support from our own organisation, the UNFFE. Together with two colleagues, we have been working to convince our CEO and other team members of the benefits of experience capitalization. We explained to them that sharing experience with stakeholders doesn’t only serve as a marketing strategy for UNFFE, but also as a way to ensure value for money. Experience capitalization brings out hidden details which are usually left behind, for example the failures encountered. We also mentioned a number of development partners involved in trying to see if experience capitalization can be institutionalized. While the UNFFE is becoming convinced, the practical question is how to make it part of every project. My colleagues and I have drafted a plan for how this could work and a first step forward is that I now have budget for dedicating some of my time to facilitating the process.

All this lobbying has paid off. Next week, I will participate in an evaluation of the USAID project where we can put part of the experience capitalization process into practice. In the past, the evaluation was the end of a project, but now, an evaluation is the perfect place to start!

Nelson Tukundane works as Communications officer at the Uganda National Farmers Federation (UNFFE), Uganda. His article, “Village savings and loans associations transform youth in Uganda”, was included in the first booklet prepared by the CTA project in 2018.

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Steve Tumambo, a youth farmer from Uganda, explains the experience capitalization process. He and his peers are very interested in sharing their experience to help others.

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LEARNING AS A FACILITATOR? DEFINITELY!

Yennenga Kompaoré
In January 2017 I was contacted by CTA and asked to be part of a group of facilitators working together in the project called “Experience Capitalization for Greater Impact in Rural Development”. I had some experience in this field, but this seemed like a different initiative. We worked together for a few months, and we have seen quite a bit, and we have also learned a lot. And I am sure that we will see much more in the future.

We had two workshops in Accra, Ghana (in March and in June 2017), with representatives of different organisations working in Ghana, Nigeria and Sierra Leone. I joined both of them as a co-facilitator, which meant that I had to help identify participants and to support the planning process, engage with all participants before and during the meetings, write a first report, and also contact all participants and help them communicate with each other when they were in the field (or back home). I was also asked to help prepare a similar process with French-speaking participants.

At the end of the day, what did it all mean?

Looking back, “facilitating” meant helping people get together, giving them the right tools to progress together within a given period of time, and also working together towards the production of a set of articles that can then be shared with others.

Having one person who can go through the whole process with all participants is positive in terms of coherence and continuity. But I think that having a co-facilitator was also very useful. The main facilitator acted as the pilot, while the co-facilitator (me) could serve as a “tourist guide”, giving additional bits of information and providing advice every time we reached a strategic place. From what I saw, I think that it is always useful to have someone who can help steer the process, and make sure that it all remains on track.

Various tools and techniques

We had a set of Power Point presentations which were used during the different sessions, and which I think were adequate (they helped us share a lot of information with all participants). They also invited people to share some ideas, and to ask many questions – and we did not always have the answers.
The work of a facilitator is not limited to a workshop: most of it takes place before and also after the participants get together.

One of the points that came up several times was the difference between experience capitalization and monitoring and evaluation (M&E), especially when we were talking about the analysis and when trying to agree on a set of criteria for this analysis. Looking back, this is one of the areas where we might need to prepare ourselves better.

We tried to get participants to tell their own stories, and we also organised practical exercises such as the “recette de cuisine”, which helped us illustrate the path and steps of an experience capitalization process. We also tried to show short videos at different moments (preferably at the end, when participants were getting tired!), and found that this was very effective. We found some on the internet which we used during the session on “adopting and institutionalizing”, and they helped us get participants engaged in a lively discussion.

Some of the facilitation techniques we used worked very well. For example, we had a very good “world café”, where we discussed the steps and conditions needed for institutionalizing a capitalization process. We also had a dynamic “peer review” process, printing each one of the articles being written 5 times, and in this way getting the comments of many of those present. Still, I feel that we could have thought of many other techniques to engage all participants, focusing on those techniques to enhance their participation. Perhaps we were much better in terms of the logistics and the preparation of the workshop than on the use of specific techniques, when these could have helped us during the workshop. We had the idea of producing a facilitators’ guidebook, and this was taken up!

During the first workshop we didn’t print forms for the practical exercises that we wanted to try with all participants (e.g. describing the case, or analysing it). This didn’t seem so important at first, but then it was hard to gather what participants were doing at the end as each one of them did it on his/her own way. I would suggest having a printed form for each exercise. But something which did work was having participants involved in the facilitation process, with a daily “co-management committee”, in charge of managing time, making photos, helping address key issues and preparing a day report.

Facilitating while far away

The process we started in Ghana also showed that the work of a facilitator is not limited to a workshop: most of it takes place before and also after all participants get together. For example, it’s very important for the facilitator to have a clear list of who is coming, and writing about what. It seems obvious now, but I didn’t have it when I needed it! The second most significant lesson refers to the need to plan the whole process and decide/write in advance the messages we wanted to share via the e-mail. As we were dealing with participants covering different themes and cases, we thought of an online discussion starting every week, covering a specific topic (the selection and boundaries of an experience; how to collect information; the analysis; the writing process). Having this planned in advance worked well. The problem was that, with time, the participation got a bit weak. Without reactions from many participants, it was difficult to say if what we were doing was right. And in the cases when people did reply, many were waiting until the last minute, so it was difficult to react to what they were saying. But the exchange did connect participants between themselves, and helped them share information.
After the workshop we had another challenge: we found that having participants working on very different cases makes it difficult to give relevant feedback. Looking back, we felt that it can be easier if they focus on a common subject. Or perhaps on a common experience? We might then not be able to have a long list of publications, but we can be much more effective in terms of discussions, and a general exchange among participants.

A learning experience

All in all, this has been a very good learning experience. Being involved in these workshops as a co-facilitator is a very good way of learning before taking the lead of a workshop. If we cannot organise a training-of-trainers session, I would suggest would-be facilitators to join those already supporting an experience capitalization process. And we could also think of a remote coaching or mentoring initiative.
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From theory to practice: Trying out a new approach
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FROM THEORY TO PRACTICE: TRYING OUT A NEW APPROACH

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