Collaborate-Learn-Adapt (CLA) Case Competition

Submission Title: **Connecting the Dots: Biodiversity Cross-Mission Learning Program**
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Contract: **Measuring Impact**
Organization Type: **Private Company/Contractor**
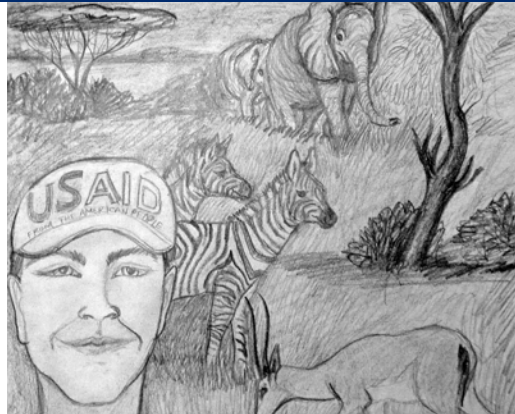Country: **USA**
Sector: **Forestry and Biodiversity**
Submission Type: **Storyboard**
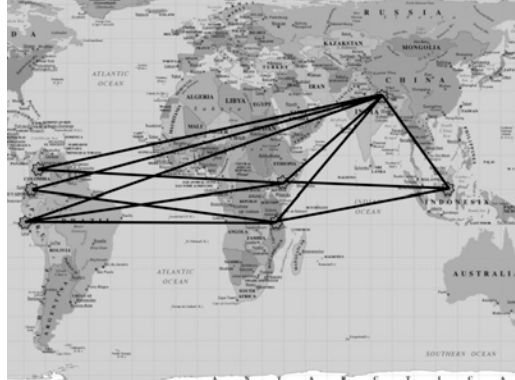Date: **August 31, 2015**

Summary: Development practitioners are challenged to develop programs that use the most effective approaches and draw on the rich body of past experience of USAID and its partners. The Biodiversity Cross-Mission Learning Program CLA initiative attempts to provide USAID staff who program biodiversity funds with a rigorous, replicable, and approachable way to learn about the effectiveness of priority strategic approaches and to share learning.
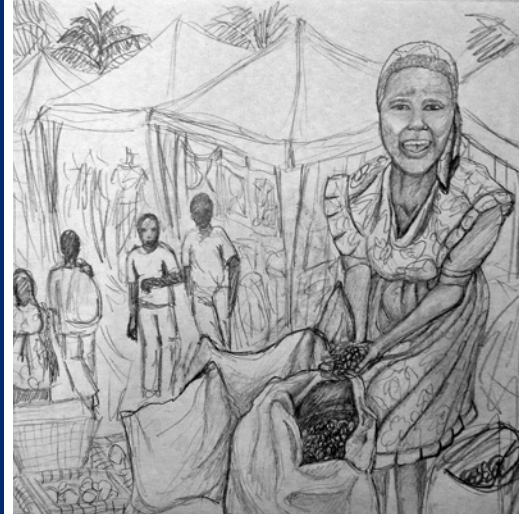
The Biodiversity Cross-Mission Learning Program has two key components: (1) a Theory of Change to serve as a common framework for implementing a learning agenda; and (2) facilitation of virtual learning groups around learning agendas that allow participants to learn at their own pace and level of engagement.

The video walks through an example we are launching in 2015, the Conservation Enterprises Cross-Mission Learning Program. It describes the need to understand effectiveness better and shows how a Theory of Change can serve as the foundation for learning. The Theory of Change for how cacao farming contributes to improved conservation is broken into digestible pieces that show how assumptions can be explored and tested with the learning agenda. Multiple Missions taking the same general strategic approach thus have a basis for collaboration on learning and sharing evidence. The video describes resources we provide that the Missions have told us – and USAID experience shows – are necessary for learning: support for developing relevant questions; syntheses of relevant evidence; and facilitation of knowledge sharing. We explain ways this effort can meet participants where they are, whether at the design, implementation, or evaluation stage, and how we have learned from our early efforts.
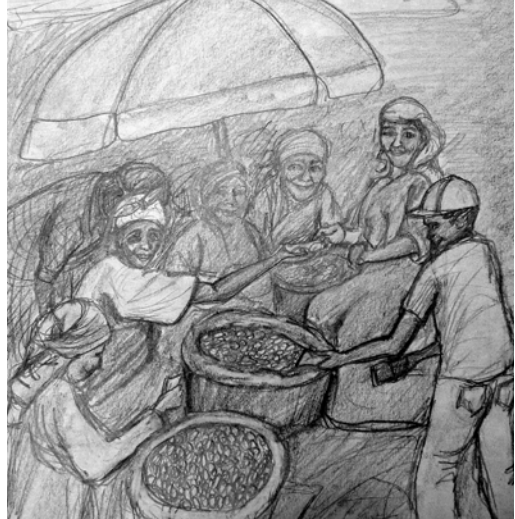
We note that USAID staff are identified in the storyboard by their position. Commitments have not been secured from individual staff to appear in the video, but will be if the video moves to production.

VIDEO	DIAGRAM	AUDIO
Describe the general action in the scene	**Draw or depict the activity that will be shown in the video**	**Describe or script out dialogue sample**
1) Tight shot of United States Agency for International Development (USAID) Environment Officer/ Africa** out in the field working onsite on a biodiversity project. He is speaking directly to the camera to get the attention of the viewer with his needs from one Mission's perspective.		**USAID Mission Staff/Africa**: "*In the rush to meet the program design deadline, we found it to be a challenge to make use of the existing knowledge and expertise inside and outside of USAID. I often wonder, 'What have others tried in similar situations? What other hard-earned lessons could we be incorporating here?'*" Additional points about time constraints and burdens.
2) The shot of the USAID Environment Officer telescopes back into a map that has 6-8 red dots and two other headshots just like him – one in South America, one in Asia. Each of the other two headshots is a video with audio that slightly overlaps to denote the series of learning questions found across geographies and positions and how they relate to each other.		**Implementing Partner/Asia**: "*Many partners are implementing similar activities. We could learn from each other so we can build on what we know.*" **USAID Mission Director/South America**: "*We don't want to reinvent the wheel or make unnecessary mistakes. Our program could benefit from a systematic learning approach to share our experiences, while at the same time helping us meet our learning needs.*" Additional points about what staff have to offer and what they would hope to take away, i.e., the latest research.
3) Video zooms back out to a USAID Bureau for Economic Growth, Education, and the Environment/Office of Forestry and Biodiversity (E3/FAB) Headquarters Staff talking to the screen for a few seconds, then her voiceover continues as video pans over a beautiful bio-diverse area. Birds fly or elephants walk by to show the rich resources.		**E3/FAB voiceover**: "*There is a great legacy of effective biodiversity programming at USAID. With more than $200 million per year in Congressionally directed biodiversity funding, we have employed a variety of approaches to conservation, in partnership with many Implementing Partners. Biodiversity programs have complex stakeholder, ecological, and development contexts, and we are always working to help Missions understand which approaches will be most effective for their situation. Missions have expressed the desire to share their experiences and learn from each other. We want to make sure that rich legacy of experience is not lost.*"

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4) Video pans back to the earlier map, but it is labeled, "*Situation Now*" across the top and includes information about where projects are in the cycle and level of success or failure to show the scope of the geography that separates programs with similar learning needs. As each speaker explains what s/he wants, the associated project dot on the map is highlighted. It dims out when they are not speaking. As the camera moves across a dot, its box appears. The box fades as the camera moves to the next dot's project information. The dots will read: "Ending: big success;" "Just starting, looking to learn;" "Ending, not much success;" and "Ending cycle, looking for new approach."	Just starting, looking to learn!	**Implementing Partner** voiceover**:** "*In Indonesia, we have invested a lot in this, so we would like to be able to share what we have learned.*" **USAID Mission Staff** voiceover**:** "*It is a challenge to review all of the evidence regarding the effectiveness of each approach. It would be very useful to have a synthesis of evidence during program design.*" **Implementing Partner** voiceover**:** "*In Peru, we have been using one approach, so I would like to hear about other strategies that might be more effective.*"
5) Now the map has the title, "Biodiversity Cross-Mission Learning Program" and the dots are animated by lines drawn between them from project to project to show that. Then two bullets unroll at the bottom of the map as they are explained, they read: 1) Use of a Common Framework for Learning (Theory of Change) and 2) Facilitated Collaboration. It shows that Missions can learn from each other if we can help them connect the dots.		E3/FAB voiceover: "*We realized these learning needs could be met by developing a Biodiversity Cross-Mission Learning Program that identifies key shared questions that can be answered together, using a common framework – or Theory of Change – for understanding effectiveness; and then connecting the Missions so they can collaborate, share, learn, and adapt.*"
6) Shot of USAID Environment Officer talking directly to the camera to show the different levels of interest in the Biodiversity Cross-Mission Learning Program.		**USAID Environment Officer**: "*There is no one-size-fits-all solution in the biodiversity sector, but when we contemplate, design, implement, or evaluate a key strategic approach, we can use the Biodiversity Cross-Mission Learning Program to collaborate on a learning agenda, test our assumptions, and adapt our programs based what we and other Missions have already learned. If we work together to answer our questions, we can make all that rich, tacit knowledge that is available in one Mission available to others. Then they, too, can gain from it in the design and adaptation of their programs.*"

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7) Cut to questions being posed by a gorilla with a series of thought bubbles to show that biodiversity programs, although complex, share similar critical questions. The thought bubbles pop up one at a time with a voiceover by USAID Mission Staff explaining the idea that if they are all working together to answer similar questions, they can learn and collaborate more effectively, create a learning agenda, and evaluate.		**USAID Mission Staff** voiceover: "*We are all wrestling with similar learning questions. I want to chart a path that articulates underlying assumptions and can be tested and measured.*" Additional questions are discussed.
8) Shot cuts to videos of people working, with the label "conservation enterprise" underneath, including beekeepers; local man holding basket of local fruit/nuts; women sitting together weaving baskets/making textiles with a voice over by E3/FAB discussing how the Biodiversity Cross-Mission Learning Program can center around a topic identified as a learning priority. It ends with a video of a woman at a market selling her cacao to customers. We hear market noises and voices.		**E3/FAB:** *"We envision the Biodiversity Cross-Mission Learning Program approach we are piloting could be used to better understand the effectiveness of any strategic approach. We are launching this Cross-Mission Learning Program with a focus on three initial topics that are common and relevant to Mission programming across the portfolio. To identify these initial learning needs, we first reviewed our biodiversity funding for the last several years. Based on document review and discussions with Missions, we are now developing a generalized Theory of Change for a focused strategic approach within those topic areas, giving us a basis to ask questions, test assumptions, and learn systematically and collaboratively across Missions. Our first learning initiative is designed to help us understand how to improve the effectiveness of programs to develop conservation enterprises."*

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9) Shot pans back over a forest and hovers over the cacao crops growing in an open field in the sun within a clear-cut area of it. Local farmers are tending to their plants. Shot cuts to a graphical depiction of the Theory of Change for conservation enterprises. Each arrow in the chain of the Theory of Change is an assumption that can be tested. Questions will appear as the Theory of Change is explained. Questions for a learning agenda can relate to if, how, and under what conditions do these assumptions hold true. Just as the gorilla asked, but now using our Theory of Change, we will ask, "What enabling conditions are most important to support?" as our first question in the process, and then the next, etc. Questions appear as they are discussed.	 Generalized Theory of Change for **Conservation Enterprises**	**Implementing Partner:** "*Once we identify the learning topic, we develop the Theory of Change that describes how the strategic approach* – supporting conservation enterprises – *is expected to lead to the desired outcome* – biodiversity conservation. *A conservation enterprise program introduces alternative livelihoods in order to take the pressure off the destruction of the threatened resource. The assumption is that if participants increase their income, then they will be motivated and able to discontinue unsustainable activities that resulted in the threats to biodiversity in the area. The results chain you see here is simply a graphical depiction of our Theory of Change.*" Additional explanation is given, with questions as they arise.
10) The shot cuts to back to that deforested patch of land surrounded by trees to show that traditional cacao farming has led to trees being clear cut on a regular basis. Shot pans across a bustling market to the coffee seller excitedly showing her product by opening up a bag of cacao and running her hands through it. She takes a handful and shows it to the camera. The first Theory of Change bubble "Support Conservation Enterprise" is laid over the video of the woman in the market.		**USAID Mission Staff/Environment Officer:** "*Let me illustrate what we anticipate will result from implementing a conservation enterprise program, that is, our Theory of Change that supporting conservation enterprises will lead to biodiversity conservation. Farmers in our region have been clear-cutting forests to intensely grow cacao using for making chocolate. Over time, clear-cutting causes soil to lose most of its nutrients, so farmers using this technique are forced to clear-cut new plots to maintain or increase production unless they want to use lots of costly fertilizers. Using a conservation enterprise approach, we will introduce improved cacao farming practices that rely on growing cacao under forest shade, with the assumption that farmers can reduce their agricultural inputs and receive a higher profit margin for 'sustainably produced, shade-grown' cacao. In this way, we believe farmers will enjoy increased income to support their families, while their improved agricultural practices will reduce deforestation.*"

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11) Cut to USAID and Implementing Partners training local coffee farmers to plant under the shade of trees while the implementing partner is talking about the plans to train them and enable the right conditions for success of the enterprise. The next bubble from the Theory of Change diagram, "Enabling conditions for enterprises are met" is added next to the first bubble, highlighted, and laid over the video. While the E3/FAB staff is discussing the key questions for learning, the video pans to USAID and Implementing Partners walking with farmers through a marketplace. FAB staff does a voiceover to discuss the opportunities for learning.		**Implementing Partner:** "*We will train cacao farmers to plant their crops under tree canopies instead of full sun. We will show them that they will not have to clear land every few years as the soil loses its fertility. Our Theory of Change assumes that for the shade-grown cacao enterprise to succeed, there needs to be market demand and profit potential for the enterprise products.*" **E3/FAB:** "*Key questions can be addressed and shared here about our assumptions, such as, 'Is the introduction of new farming techniques going to result in a higher profit margin?' 'Do we need to support market value chains as enabling conditions for the enterprise to be successful?*" Additional assumptions are discussed.
12) Video continues at the marketplace as the Implementing Partner is discussing the role of benefits to the farmers. Buyers are talking with the cacao sellers at their stalls in the marketplace. The shot zeroes in on a local cacao seller at the market receiving cash from buyers. The third bubble from the Theory of Change diagram: "Benefits are realized by stakeholders" is added next to the first two bubbles in the chain, highlighted, and laid over the video. E3/FAB staff does a voiceover to discuss the opportunities for learning.		**Implementing partner:** "*The Theory of Change assumes that if enabling conditions to sustainably grow and sell shade-grown cacao are met, then greater benefits will be realized by stakeholders. We anticipate that by providing training and assistance to identify markets that help the shade-grown cacao enterprise succeed, farmers will earn more income per kilogram as a result of accessing markets that will pay a premium for shade-grown products – thus improving their livelihoods.*" **E3/FAB:** "*Some key questions for learning are, 'Is market demand for shade-grown cacao sufficient to provide needed benefits?' 'If cacao is produced through communal cooperatives, what is the most effective way to distribute benefits of the enterprise among farmers in the community?'*" Additional assumptions are discussed.

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13) Video shows people tending to their cacao crops and showing them to the camera, all while the tree branches hanging over them show they didn't have to cut the trees to produce high yields of cacao. Mission staff discuss the intact forest while the famers are proudly showing their plants to the camera. The fourth bubble from the Theory of Change diagram: "Stakeholders' behavior is changed" is added to the chain, highlighted, and laid over the video. E3/FAB staff does a voiceover to discuss the opportunities for learning.		**Mission Staff/Environment Officer:** "*Our Conservation Enterprise Theory of Change goes on to assume that, greater profit margins from shade-grown cacao, farmers will no longer feel the need to cut down more forest to plant their crops, thus leading to decreased deforestation.*" **E3/FAB:** "*Our learning questions here are, 'Were the benefits enough to encourage enough farmers to make this change? 'Did other farmers come in and clear the land anyway?' 'Did farmers participating in the project use their new-found profits to invest in more forest clearing rather than acting to conserve the forest*?' '*When the enterprise is linked to a resource – like shade-grown cacao is linked to forest canopy – does it motivate stakeholders to protect the resource from external threats as well?'*"
14) Shot zooms into a beautiful, intact forest to show that the crop relied on the existing tree canopy to be lush. Branches and leaves are evident above the plants. The bubble "pressures to biodiversity reduced as a result of behavior change" from the Theory of Change diagram is added to the chain, highlighted, and laid over the video. E3/FAB staff ends the discussion of the Theory of Change used for the shade-grown cacao conservation enterprise with a voiceover to discuss the opportunities for learning.		**USAID Mission Staff/Environment Officer:** "*If our Theory of Change holds, then implementing shade-grown cacao enterprises should bolster rural livelihoods and reduce deforestation.*" **E3/FAB:** "*With several Missions implementing a similar Theory of Change for conservation enterprises, the foundation is in place to test assumptions and support systematic learning about the effectiveness of the approach, certainly across those regions where cacao is such an important crop – Africa, Asia, and Latin America. Because it provides a common framework, this Theory of Change approach lets us learn both within a Mission and – and this is what we are very excited about – across Missions.*"

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15) The close shot of the forest pans out to a larger landscape shot to include animals, people, and mountains to show how the larger ecosystem benefits when the existing forest is protected, not patchy. As the E3/FAB discusses the best practices and lessons learned, bullets appear saying, "Successful learning efforts need: Facilitation of the learning group; a well-defined learning question; and relevant and easily digestible information and evidence."		**E3/FAB:** *"Our Biodiversity Cross-Mission Learning Program uses the common Theory of Change as a foundation for developing and implementing a learning agenda. We have learned from studying USAID experience across sectors that successful learning efforts need to provide facilitation to the learning group; focus on well-defined and relevant learning questions; and provide relevant and easily digestible information and evidence."*
16) Transition to a staff member from Measuring Impact (MI) in her office. Shot cuts away as a voiceover continues to a still of the Collaborative Learning Group landing page, pans over a still of the Conservation Enterprises Brief, and scans the emails in the listserv. Then, while MI staff are discussing analysis and evidence undertaken to support the learning opportunities, three different videos of three different USAID staff members/ Implementing Partners who spoke at the beginning of the video are now at their computers sharing what they have learned. A fourth person comes to her computer and sits down and starts to type. These four videos fill the screen, each in a quadrant to depict sharing, different levels of engagement, and different resources.		**Measuring Impact (MI) Staff:** *To meet these needs, the Biodiversity Cross-Mission Learning Program produces reports and webinars that synthesize evidence from USAID experience. We also share wider literature to provide Missions with the current state of knowledge. We are working to interview Mission staff who might be interested in learning more about the effectiveness of this strategic approach and are developing plans to work together to gather the data needed to answer key learning questions. As a next step, we are launching a web-based interactive platform to support the work of the learning group in late 2015. We are also completing analyses to supplement the existing evidence on the effectiveness of conservation enterprises."*

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17) As E3/FAB discusses efforts to evaluate the learning program, four bullet points are laid over a still of the marketplace. It reads, "Lessons learned:" and each of four bullets appears as it is said by E3/FAB: "Try to meet Missions where they are; Mission engagement is dictated by the relevance of the learning questions; Focus on people, not platform; and Diversify knowledge storage."		**E3/FAB:** "*This CLA initiative is just getting launched in Missions, so we are eager to learn from other CLA pioneers at USAID. To track our own progress, we are keeping engagement logs and using outcome harvesting so we know how, how much, and when Missions are engaging, and ultimately how Missions are improving their conservation work. Although it is early in our process, we have learned to try to meet Missions where they are; that Mission engagement is dictated by the relevance of the learning questions; to focus on people, not platform; and to diversify knowledge storage.*"
18) The words fade away and the still of the bustling market comes to life and pans out over the surrounding beautiful, wild place that is teeming with diverse life. The video ends with USAID logo, Measuring Impact's URL as well as information about the opportunity to join the Biodiversity Cross-Mission Learning Program.		**E3/FAB:** "*The Biodiversity Cross-Mission Learning Program as a great opportunity for engagement on CLA. We see this as part of the Agency's larger effort to encourage learning. It's an approach to learning in our sector, but it can be used in other sectors.*" **USAID Mission Staff:** "*Regular learning and sharing makes my project better.*" **USAID Mission Director:** "*CLA leads to more effective conservation, and conservation is development.*"

**Mission staff here and throughout are suggested and will be approached should the video move to production; commitments have not been secured from Mission staff to appear.