



RELASER COUNTRY FORA

METHODOLOGICAL GUIDELINES FOR DEVELOPMENT AND SUSTAINABILITY

INTRODUCTION

The Latin American Network for Rural Extension Services (RELASER) was created in October of 2010 as an institutional space for the promotion and strengthening of Rural Extension and Advisory Services (REAS) in Latin America. It promotes dialogue and cooperation to generate approaches, strategies, policies, methodologies and tools for REAS, agricultural innovation and rural development. The network works through the exchange of experiences, information and knowledge.

RELASER's Vision is to be a protagonist in the articulation of spaces that contribute to the improvement of competitiveness, sustainability and social equity of the agricultural and rural sector.

RELASER's Mission is to support the consolidation of public and private extension systems, that within the innovation systems, promote sustainable development in Latin America.

To achieve its mission, RELASER develops **several lines of action**:

- REAS's Monitoring, reflection and controlling capacities strengthened in the region, considering the economic, social and political environment, promoting their relevance and sustainable development.
- Support in the definition of strategies and policies that guarantee innovation and the strengthening of REAS's institutional framework in the countries of the region, as part of agricultural innovation systems that bring together multiple social initiatives.
- Promote the improvement and development of training programs for professionals and technicians specialized in the conduction and operation of REAS, with the capacity to lead the renovation of the services in the different countries, through technical and university level programs.
- Promote the systematization and generation of evidence about the results and impacts of REAS experiences in the region.



RELASER is formed by public and private institutions from 16 Latin American countries: Argentina, Chile, Bolivia, Uruguay, Paraguay, Brazil, Peru, Ecuador, Colombia, Costa Rica, Guatemala, Honduras, Nicaragua, Dominican Republic and Mexico. CORPORACION AGRARIA oversees the Executive Secretariat.

RELASER is part of the Global Forum of Rural Advisory Services (GFRAS) that has the **mission** to “provide advocacy and leadership on pluralistic and demand-driven rural advisory services for sustainable development”¹.

A key element of the strategy of RELASER and GFRAS is building and strengthening Country Fora (CF) of the network at the country level. The **Country Fora of RELASER have the objective** of highlighting the topic of extension in the national debate towards its improvement. They work by identifying, classifying and articulating relevant actors to jointly develop a Work Plan to influence the country's policies.

This document systematizes the main methodological guidelines for the construction of the CF of RELASER. The contents have been developed from the discussions of an ad hoc working group of CF leaders that met in Bogota in June 2013. It is based on the reflection from the first experiences in the forging the CF and it aims to guide, as an evolving open strategy, that should be flexible enough to adapt to changes and to adjust to the different national contexts. It should promote initiatives, reflection and best fit approaches depending on the conditions present in the process of forging the CF in each country.

In this way, it **aims to be a guiding instrument** that provides criteria and practical guidelines for the implementation and consolidation of the CF as spaces for dialogue and learning in each country. **It is addressed to the members of RELASER in each country and all those committed to REAS** who are interested in joining in the construction of the regional network.

The **content of the document is organized** according to the phases or stages of the process of construction of a CF. The first chapter details the purpose, scope and stakeholders involved in the process. The following chapters describe the key aspects of each of the major stages by which we believe a CF must go through for its construction and consolidation.

¹ <http://www.g-fras.org/en/about-us.html>



CHAPTER I

GENERAL CONSIDERATIONS

1.1. Definition of a Country Fora of RELASER

RELASER Country Fora (CF) are the grouping of people and institutions dedicated to the promotion of REAS in a specific country in Latin America. They are the national or sub-regional nodes that congregate institutions and people, committed to achieving the mission and vision of RELASER at the national level. RELASER's strategy highlights the importance of the CF for the dynamization of the network and their potential impact in the public policies of the countries.

The main objective of the CF is to highlight the need to strengthen REAS in the national agenda, as an important component of the National Innovation Systems. They work through the identification, involvement and articulation of stakeholders for the implementation of a common agenda to improve the country's policies.

1.2 Stages for building and strengthening a CF

To achieve a sustainable CF, it is necessary to go through three stages. First, making a call to form a CF, that involves activities of preparation to the first meeting with the national stakeholders. Second, the implementation of the CF, that involves the first meeting and the formal constitution of the Fora. The third and final step is the consolidation of the Fora, that includes its development and maintenance through the achievement of its goals.

It is important to highlight that this process of institutional construction is not linear. It is marked by the links and jumps between stages and between the elements within each of them. Additionally, this effort to build a network in a country, involves a process of intense dialogue, where various stakeholders connect with others, around multiple interests and perceptions.



1.3 Involved Stakeholders

The following stakeholders and key functions have been identified:

Focal Point: it is an institutional actor that assumes the responsibility to lead the process of constitution of the CF and to legitimize the initiative. Its main competence is to link and commit the CF with RELASER, to bring together the key REAS stakeholders and to be a national reference for its trajectory in the sector. The Focal Point institution should designate one or two people to be in charge of the task.

Core Group: it is the group of institutions and / or people with recognized capacity and interest in the subject. Together they become the promoters of the initiative and are responsible of identifying, motivating and convening national stakeholders to build the CF in the country.

Steering Committee of the CF: some CF have decided to create a Steering or Executive group of stakeholders that oversees the conduction and implementation of the activities and Work Plan. It consists of a team of around five delegates who meet periodically to follow up the implementation of the Work Plan and the consolidation of the CF.

CF members: all the organizations and people that are part of RELASER in each country. They actively participate in the activities of the CF, in the meetings and activities promoted by the network at the country and regional levels.



CHAPTER II

FIRST STAGE: CALL FOR THE COUNTRY FORA

Consists of the formation of the initial Core Group of promoters and the design and implementation of the initial activities for the CF. The success of this first stage is pivotal for the successful completion of the CF.

Objectives of the Stage

- Identify champions that will promote the initiative and position the Fora to make it visible and recognized as a benchmark for advocacy and generation of evidence;
- Classify stakeholders according to the potential role and contributions for the network;
- Establish the framework for the elaboration of the CF's Work Plan for the short and medium term. The Work Plan should consider national and regional activities.

Expected results

- Consolidation of the Core Group
- Event of constitution of the Country Fora

Main activities

1. **Definition of the Institutional and Technical Focal Point:** the institution and the person who has the institutional and technical capacity to lead the mobilization process for the CF is identified and selected. It is identified based on: i) participation in previous activities of RELASER, such as the annual meetings, ii) their role in the development of REAS in the country, iii) their commitment to RELASER's mission and vision; iv) their capacity and authority to mobilize and convene cooperation and dialogue around REAS; V) their moral and professional authority before the national community. The **main tasks of the Focal Point** are:
 - Definition of the contents of an articulating agenda that motivates the broad set of REAS stakeholders to participate;
 - Identification and coordination of initial approaches with strategic stakeholders;



- Dissemination of communication material to inform and raise awareness of key issues relevant to the CF;
- Convene and lead the formation of the Core Group.

2. **Initial Approach:** brief, direct and motivating information about the initiative is generated, considering its pertinence and viability according to the reality of the country. Afterwards, it is shared with the strategic stakeholders to receive their feedback. In this way, it's possible to collect the initial expectations and comments motivating their involvement. The information is disseminated through formal invitations: traditional and non-traditional.

It is important to consider that some institutions or individuals will not know RELASER, or may just have a few background elements. Systematized documentation about the network should be available and ready to be shared with the participants to homogenize the level of knowledge about the key aspects.

The documentation should include the following elements:

- a. What is RELASER?
- b. What is RELASER involved in right now?
- c. Who are the members of RELASER?
- d. Key milestones of RELASER (e.g. annual meetings)
- e. Key elements of the Work Plan and Strategy and Action Plan

These contents should be presented and delivered to the participants as an attractive factsheet. A revision of the full Work Plan and Strategy should be recommended to those interested in getting further details.

3. **Creation of the Core Group and or Steering Committee:** a small group of institutions and / or people with recognized capacity and interest in REAS is selected and invited by the Focal Point to initiate an open dialogue about an issue around the theme that is relevant for the country in that moment.

It is expected that the group will meet several occasions to achieve results. They shall use information and communication technologies (new and traditional) to promote the participation of the members to reduce time and geographical constrictions.

It is important to point out that this process usually requires of several sessions. At the beginning scattered ideas will arise and it will be difficult to advance. Therefore, it will be necessary to contextualize each meeting and direct the proposals towards the achievement of the desired results.



The Focal Point is the most adequate stakeholder to lead this process using RELASER's Strategy and Work Plan as a guide and key input for the whole process.

This group has two important tasks:

- Carry out the mapping of relevant stakeholders from a REAS systems perspective;
- Generate an agreement that will result in the implementation of the CF (Fora extended to more stakeholders), based on the Work Plan and Strategy of the network and the political, social and institutional particularities of each country.

4. **Stakeholder Mapping:** this implies the elaboration of a map that names the key institutions and people related to REAS in the country. It is important to revise it properly and not miss anyone, to consider their interests, expectations and commitments to achieve sustainably of the CF.

This process is complex and important. The following classification fields are suggested:

- Public stakeholders (ministerial services, directly or indirectly linked to extension, agriculture, education, planning, etc.);
- Private stakeholders (suppliers of technical assistance, agribusiness, NGOs, companies, civil associations, producer organizations etc.);
- Academic stakeholders (universities, training institutes, non-formal educational centers, etc.);
- Multilateral, Cooperation and International Organizations.

5. **Development of the Conceptual Framework:** the meetings with the Core Group are aimed to agree and validate the Strategic Guidelines of the CF. In this process, the group motivated with the idea of fostering a space for REAS dialogue and knowledge management that brings together several stakeholders from the national innovation system².

For logistical and operational purposes, it is desirable that the Core Group finishes their tasks in this stage, before starting the next one. In stage II, the CF will be formed with a broader set of members and two bodies will be created. A Steering or Executive Committee, a small group of key stakeholders that will lead the initiative that meets permanently and an Extended Group of CF Members, which is the basis of the CF that brings together all the relevant stakeholders less frequently, more or less twice a year.

² <http://www.relaser.org/index.php/documentos/repositorio-de-documentos/estrategia-y-plan-de-trabajo-de-relaser-2016-2018/download>



CHAPTER III

STEP TWO: IMPLEMENTATION OF THE COUNTRY FORA

The second stage is oriented to the formal constitution of the CF through the impetus of the first national meeting. The objective is to have a powerful event in terms of contents, commitments and organization for decision-making and implementation of a Work Plan.

Objectives of the Stage

- Formal implementation of the CF as a subsidiary of the international initiative during the first meeting;
- Develop the Strategic Framework the CF;
- Design of the Advocacy Strategy that promotes changes in public and private policies.

Expected results

- Work Plan validated with responsibilities;
- Advocacy and Awareness Plan;
- Constitution of the Executive Committee.

Main activities

1. **Call for a meeting:** the map of stakeholders is used as an input to define the institutions and / or people that will be invited. The objective of the meeting is to create a space for analysis, debate and improvement of the REAS in the country that becomes Country Fora of RELASER.

This event should bring together stakeholders that express a genuine and explicit interest in taking part of the initiative. The context about RELASER and GFRAS should be provided and the participants should be aware that the CF in their country will become part of the international initiative and they are invited to participate in these broader spaces.

The event is prepared and organized by the Core Group and the following aspects should be considered:

- The call should be made considering interest of the stakeholders; however, it is necessary to motivate public (institutional and productive) actors to join;



- Careful selection of the contents for the development of the meeting. It should be attractive and addressing the concerns of all the different parties invited.
2. **Definition of Vision and Mission:** based on the premise that all the participants are motivated by the common interest of the improving REAS, the interests and expectations are identified and agreed upon.

Clear postulates that contemplate elements of identity and projection are developed. The idea is that they will motivate the participation of the institutions because they feel fully represented. It is important to consider mechanisms of action for the achievement of results and objectives that are above the interests of each one of the members.

3. **Elaboration of Objectives:** clear objectives that facilitate the participation and the commitment of the different stakeholders are developed. This activity is considered one of the priorities for the successful implementation of the CF.

The objectives should:

- Contain aspects related to the strengthening of the CF;
 - Propose commitments of those involved;
 - Contribute to participatory models that stimulate articulation;
 - Contribute to national knowledge and inter-institutional articulation around REAS;
 - Propose achievements that are relevant, feasible, coherent and sustainable.
4. **Identification of Opportunities and Challenges:** the local context of rural extension is analyzed focusing on the opportunities and challenges. These elements will be used for the planning process.

The following criteria are suggested for the analysis:

- Consider the participation of various stakeholders such as public and private sector, producer organizations (cooperatives, associations, committees and others), that can define fields of action based on the elements identified;
 - Identify issues limited to REAS which directly and indirectly affect the institutions involved;
 - Consider the contributions from each institution and sector involved because its fundamental to obtain official and updated information.
5. **Definition of Topics:** identify and select topics related to the opportunities and challenges defined in the previous activity. REAS topics that motivate the interests and expectations of the stakeholders, that are relevant for the national context, where the CF could have an impact are selected.



The proposed topics should consider the following criteria:

- Coherence: consider topics that are being addressed at the regional level to be able to exchange, contribute and to receive inputs from other countries.
 - Pertinence: direct correlation between the initiatives of the CF with the reality and problems of the country. In this way, the results will be useful.
 - Feasibility: considering the resources available, the interests, and expected results of the members in each topic.
 - Sustainability: technical and financial capacity of the members for the appropriation and continuity of the initiative.
6. **Elaboration of the Manifesto of Principles**: a brief document (concept note or executive summary) that expresses the fundamental principles of the CF is developed collectively.

The document is created to facilitate the initiation of activities. It is developed according to the agreements of the Core Group and the proposals of the Broad Members during Stage II. It promotes the participation and the involvement of the key stakeholders.

7. **Developing a Work Plan**: further meetings are scheduled after the formation of the CF with the exclusive aim of designing the Work Plan.

Developing the Work Plan includes the definition of objectives, procedures, processes, results and products, actions and goals in the short and medium term. This should encompass the national issues and activities as well as having in perspective the topics and events that are being organized at the regional and global level by RELASER and GFRAS.

8. **Formalization of Commitments**: it is proposed that each institution nominate their official representative and a substitute that will participate in the CF meetings. The idea is to avoid having new people in each meeting what will hindrance the flow of the discussions. The nomination should be done through a formal letter to allow more commitment.

It is also important to formalize the relationship and commitments through interinstitutional agreements. They should clearly state the roles and responsibilities.



CHAPTER IV

THIRD STAGE THREE: CONSOLIDATION OF COOUNTRY FORA

After the CF has been launched, a broad set of paths and options appear, but the implementation of the Work Plan becomes the substantial aspect of the new stage. The activities should aim to provide dynamism and sustainability to the CF in a medium and long term.

Objectives of the Stage

- Consolidate the CF and assure its sustainability.

Expected results

- Management documents of the CF;
- Systematization of experiences;
- Projects and Work Plans;
- Results reports about the compliance with plans and projects.

Main activities

1. **Organizational Formalization:** establishment of a basic structure of operation that identifies responsibilities and distributes tasks to undertake actions and allows to manage the resources of the CF.

The minimum organizational instances are created and strengthened in Stages I, II and III, which are: the Focal Point, the Executive Committee and the Fora (plenary). During this activity, criteria and minimum guidelines for the elaboration of "Emblematic Products" will be established, based on successful experiences and good practices of the Fora, which will serve as a guiding input to other institutions and position RELASER as a reference on innovation and rural extension.

There are three key tasks within this activity to promote the unification and identity in the Network:

- Identify the products that the CF wants to achieve based on the reality and national situation;
- Determine the structure and guarantee the quality of these products;
- Implement pilot products as a means of verification and validation.



2. **Institutional Partnerships:** aspects that formalize relations within the CF are defined such as positions, hierarchies, costs and legal frameworks. This activity will strengthen the formalization of partnerships for the development of projects arising or promoted by the CF.

The implementation of this activity involves five tasks:

- Conformation of Work Groups around topics, themes or projects where each member has a responsibility;
- Agreement around the issues of intellectual property of products;
- Determination of responsibilities in the CF with leveraged alliances;
- Linking the alliances and their results to the communication and knowledge management tools of the regional network.

3. **Expansion and Decentralization:** The Core Group or Executive Committee allows the integration of new members that find in the forum an opportunity to develop specific and collective initiatives.

An essential element that should be considered for involving new stakeholders is to allow the development of ad hoc mechanisms for each type of audience, considering the specific interests, motivations and capacities for contributing to the objectives of the CF.

It is important to have dissemination materials containing the key documents of the CF, such as the Concept Note, the Declaration of Principles and the Work Plan. In this way, the newcomers will easily access to the relevant information about the CF and expected results. The achievement of this activity involves:

- Design of simple tools that guide the process of linking institutions and / or individuals to the network;
- Monitor the operation and growth to avoid a structure with inefficient levels of workload.

It will be important to put a special emphasis in targeting organizations that are outside the capital, allowing the CF to include experiences of the whole country and not only the ones that are present in the main city. In this way, the CF should promote the establishment of provincial or regional nodes.

4. **Communication and Knowledge Management:** A communication strategy is established with guidelines for different levels: (i) external, (ii) horizontal and (iii) internal.

The strategy is understood as a process of integral communication that goes beyond divulgation. It includes tools that allow the interaction among CF



members to build capacities and to reflect and learn in the process of building the CF. It is desirable to articulate the strategy with the activities of RELASER and GFRAS, in such a way that the products can provide inputs for the regional and global levels.

Strategic activities according to intervention levels:

External Level (stakeholders relevant to the process are identified at national, regional and international level)

- Identify the expectations of the external stakeholders about the CF and its activities;
- Establish information flows that reflect the initiatives and results of the CF considering the expectations identified;
- Position RELASER as an instrument that can help to promote the development of plans and programs related to extension and technical assistance in Latin America;
- Identify communication and KM intentions of the different types of stakeholders, in such a way that the links that are being established fulfill the purposes of the stakeholders and of the CF;
- The communication strategy must consider the advocacy inputs required for achieving incidence towards REAS in the country.

Horizontal Level (to allow links between the different CF of RELASER)

- Share about the level of development of each of the CFs, their results and lessons learned;
- Share information, documents, experiences that allow to the construction of conceptual frameworks for RELASER at every level;
- Participate in international or national events promoted by RELASER (virtually or face to face);
- Generate schemes of identification of the capacities (profiles) of the individuals and organizations participating in the CF to understand and enhance the links between them and build relationships based on their interests and needs;
- Promote inputs that feedback and guide the action of the network in general.

Internal Level (among the different stakeholders of the CF)

- Notify about the agenda of the CF and the objectives;
- Inform about the activities, their level of development, their results and lessons learned;



- Inform about the results and products of the CF and their links with the regional and global (RELASER/GFRAS) initiatives;
- Inform about the rules that determine the participation of the actors in the Fora;
- Its alignment with the perspectives and purposes of RELASER and GFRAS.

In the field of Knowledge Management, mechanisms are created to systematize experiences and to promote interactive processes in and between the countries involved.

This activity is the opportunity for the CFS to establish ways to improve its internal dynamics and to become a source of results since it generates methodologies for working in organizational schemes in the network.

Networks generally become cohesive through work that allows them to cooperate. Therefore, RELASER should identify and promote:

- Collective construction of a KM method for the Network;
 - Systematization of relevant experiences, based on a methodology designed and promoted by the CF and regional network;
 - Feedback for the cases or significant experiences.
5. **Funding:** the idea is that the organizational structure acquires funds through public events and project proposals, as well as through the organizations involved (economic or in-kind contributions).

On the other hand, in the extent that actions are defined in the short and medium term, funding can be achieved through some projects where the CF has a more active participation.

The determination of the KM strategy in the network must be contained in the definition of the objectives of the network, which, as already mentioned can and must be considered more as a tool than an end.

Thus, there is another issue associated with the funding structure: the clear determination of how the resources will be distributed.



CHAPTER V

ANNEX: SUPPORT TOOLS

1. Incidence/Advocacy

Incidence is much more than achieving or not a specific change in an existing policy or the formulation of a new one. The various types of incidence (advocacy) proposed by Lindquist (2001) include:

Types of influence	Indicators and tools
Expand the capabilities of the policy	Improve knowledge / data of certain stakeholders
	Supporting staff to develop innovative ideas
	Improve the ability to communicate ideas
	Develop new talents for research and analysis
Expand the horizons of the policy	Provide opportunities to interact / learn from colleagues from elsewhere
	Introduce new concepts to frame the debates based on the inclusion of issues on the agenda and / or from enhancing public debate
	Educate researchers and those in new public positions to have a broader understanding of some topics
	Promote dialogue among decision makers
Affecting policy regimes	Partially modifying existing programs or policies
	Integral redesign of programs or policies

Source: Lindquist (2001).

In addition, we can find different ways to detect the degree of progress in the changes proposed above. Jones and Villar (2008) present the following types of changes:

- a. **Discursive changes:** changes by political stakeholders regarding how to name and / or describe issues related to public affairs. These changes reflect a new or improved understanding of an issue - even if it does not imply an effective change in the policy or practice.
- b. **Changes in procedure:** changes in the processes through which decisions are made. For example, the incorporation of consultations into policy processes that had always been closed.
- c. **Changes in the content of the policy:** changes in the substance of policies such as strategy papers, laws and budgets.



- d. **Attitudinal changes:** changes in the way one thinks and reacts about a given, either by drawing attention to new issues, or by affecting the consciousness and perceptions of the main stakeholders.
- e. **Behavioral changes:** lasting changes in the way political stakeholders act or relate to others because of formal and informal changes in discourse, process, and content.

Additionally, there are various medium or long term effects linked to changes in public policies to which the initiative may have contributed and which are also ways of influencing that can be identified and measured. Examples developed by the “Organizational Research Services” of types of changes and effects are presented below.

Type of change desired	Examples of effects
In social norms	<ul style="list-style-type: none"> Changes in awareness levels Increased agreement on the definition of a problem Changes in beliefs and values Changes in attitudes Changes in the relevance of an issue Increasing the alignment of a campaign goal with social values Changes in public behavior
Strengthening of the organizational capacity	<ul style="list-style-type: none"> Improvement of the: i) organizational capacities and abilities, ii) capacities to communicate and promote messages, and iii) the stability of organizations working in policy advocacy
Partnership Strengthening	<ul style="list-style-type: none"> Increased number of partners supporting an issue Increased level of collaboration Increased alignment of partnership efforts (shared priorities and objectives, common accountability systems) Strategic alliances with important partners (stronger relationships and alliances) Increased ability of coalitions working on policies to identify processes of change in policies (space for change, steps for policy change based on an understanding of opportunities and challenges)
Strengthening of the supporting basis	<ul style="list-style-type: none"> Increased public involvement in an issue Increase in the voter registration Changes in electoral behavior Increased range of partners supporting an issue Increased media coverage (number, priorities, scope of coverage, variety of media)



	Increased awareness of the campaign principles and messages among the target groups (politicians, public, opinion leaders) Increased visibility of the campaign message (participation in debates, presence of the campaign message in the media) Changes in public will
Policy Enhancement	Development, adoption, implementation and / or implementation of policies
Impact	Improvement of social and physical conditions (poverty, habitat diversity, health, equity, democracy)

Source: Own elaboration, based on Organizational Research Services