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# ENVIRONMENTAL COMMUNICATION, LEARNING AND OUTREACH (ECO)

## BIANNUAL STATUS REPORT

OCTOBER 1, 2013 – MARCH 31, 2014

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Environmental Communications, Learning, and Outreach (ECO)

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# SEMI-ANNUAL REPORT

## INTRODUCTION

USAID's Environmental Communication, Learning and Outreach (ECO) program began in October 2013 and is part of the Bureau of Economic Growth, Education and Environment's (E3) efforts to meet USAID objectives in training, communication, knowledge management and facilitation in the Environment and Natural Resources Management (ENRM) sector and Global Climate Change (GCC) issue area. The two primary ECO program objectives are (1) to provide USAID staff and the broader development community with the requisite knowledge, skills and abilities to design, implement, monitor and evaluate quality programs and (2) develop and enhance communications and information management systems that facilitate knowledge sharing and learning for improved development impact. ECO builds on the lessons learned and activities from the Capitalizing Knowledge, Connecting Communities (CK2C) contract (including the ENRM- Learning Initiative (ENRM-LI)) and the Office of Global Climate Change's Training, Outreach and Communications Task Order (GCC TOC).

The work to be performed under this Task Order consists of the following four tasks.

Implementation of the activities under each task will occur concurrently.

- Task 1: Competency-based Training
- Task 2: Knowledge Management
- Task 3: Communications and Reporting
- Task 4: Facilitation

The ECO implementation team is currently comprised of Training Resources Group, Inc. (TRG), Engility/IRG and Forum One Communications. This semi-annual report covers the period from September 30, 2013 to March 31, 2014.

## HIGHLIGHTS

In the first six months, ECO reached several important milestones that have established a strong foundation for the project moving forward. The Nature, Wealth, and Power 2.0 (NWP 2.0) Launch was a major achievement during this initial period. Not only did the event showcase the NWP framework for integrating projects, but it introduced ECO to the USAID community and the broader development community. The implementation of the Learning Needs Assessment was another significant achievement. The assessment used quantitative and qualitative methods to collect important baseline data to inform the learning strategy for the project's next phase. The data are also being used for the project's M&E process. Another major success was the implementation of the first ECO training course in Lima, Peru. The course focused on the integration of global climate change across sectors and was for a non-environment audience. Finally, ECO made significant strides in establishing the framework and systems to support the management of the project. ECO increased its staffing to meet the project's expanded needs (particularly regarding communications and knowledge management), established a budget monitoring system that provides important data at the office and task level and put in place information sharing systems using the web-based platform Basecamp.

# LEARNING NEEDS ASSESSMENT (TRAINING & KM)

## SIGNIFICANT ACCOMPLISHMENTS

Starting in November 2013, the ECO team defined a methodology for the Learning Needs Assessment process that will culminate with the writing of the ECO Learning Strategy. Several ECO team members have been instrumental in developing and implementing this LNA: Patricia Garcia (LNA Lead), Marie-Ange Binagwaho, Meredith Ferris, Samantha Wapnick, Michael Radar, John Schneider, Scott Loomis, Helen Petrozzola and Kimberly Kennedy.

The LNA objectives were:

- 1) Determine learning (related to both training and knowledge management) required for/desired by target audiences to effectively design, implement, and monitor GCC, Water, and Environment and Natural Resources Management programs according to current competencies and future needs based on USAID's recently approved Global Climate Change, Water Strategies, and the Biodiversity Policy. The LNA's objectives included:
  - a) Provide information on the primary audience of the ECO Learning Initiative and its learning needs.
  - b) Provide information on the secondary audience of the ECO Learning Initiatives (e.g. other sectors) and its learning needs.
  - c) Define what more advanced learning means in the context of what is needed to perform on the job.
  - d) For existing competencies, identify the gap between required Knowledge, Skills and Abilities (KSAs) and current staff capabilities.
- 2) Identify the learning preferences of the target populations.
- 3) Identify ways to offer learning solutions to the target audience(s) in the most effective way.
- 4) Develop a learning strategy that provides a template for training, knowledge management and communications.
- 5) Identify ways to engage field-based staff in this learning process, not only as learners but also as content/experience providers.
- 6) Provide a baseline for Monitoring and Evaluation (M&E) efforts and investigate the most effective ways to implement this learning strategy.

Key accomplishments as of March 31<sup>st</sup> are:

- **LNA methodology was defined and approved.** A key accomplishment of the LNA process has been the strengthening of a collaborative working relationship within the ECO team and the generation of an approach that ensures the involvement of the four USAID E3 offices (Biodiversity, Land Tenure and Natural Resources Management, Global Climate Change and Water) in data collection and assessment.
- **Target Audience defined:** One of the first steps in the LNA process was to define target audiences. This was an important achievement that will inform the implementation of the Learning Strategy.

- **RM Portal Rapid Needs Assessment:** In January, the ECO team conducted a rapid communications and knowledge management assessment. This was focused on the RM Portal. It was followed up by an RM Portal Expert Assessment and RM Portal Usability Test. The process generated a series of recommendations to improve the user experience that are being implemented by the RM Portal Administrator.
- **LNA Data Collection-** An important accomplishment of ECO has been finalizing the data collection phase of the LNA. A comprehensive draft report was submitted to the USAID ECO Team on March 31, 2014. The data produced formed the basis for creating the ECO Learning Strategy. A final report was submitted on April 15, 2014. The data collection process included:
  - **A survey** comprised of 55 questions that was launched on February 13, 2014, reaching about 1500 USAID staff. The total number of respondents to the survey was 460. Once the data was cleaned, the data set comprised 437 respondents.
  - **Interviews and focus groups:** the ECO team conducted 14 focus groups (6 field; 8 headquarters) and 23 interviews (14 field; 9 headquarters).
- **Baseline data for M&E process:** One of the key objectives of the LNA was to provide a baseline for the ECO M&E process. The data provides an assessment in 40 competencies as well as for specific skills and knowledge of global climate change and water technical areas.

#### **IMPLEMENTATION ISSUES OR PROBLEMS**

- As the LNA process started, the team found some difficulties in organizing focus groups and interviews given the relatively short time between the invitation to participate and the actual focus group or interview. This resulted in fewer focus groups than we had hoped and limited participation in the focus groups.

#### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

- The ECO team devoted one member to follow up with potential interviewees or focus group members and was flexible in scheduling; the ECO team adapted to interviewees' schedules.

# TASK I: COMPETENCY-BASED TRAINING IMPLEMENTATION

## 1.2 GCC TRAINING ACTIVITIES

### ACTIVITY 1.2.1: GCC TRAINING LOGISTICS, FACILITATION AND CONTENT SUPPORT – PERU COURSE DELIVERY

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#### SIGNIFICANT ACCOMPLISHMENTS

The GCC Office held its Global Climate Change and Development training course for a non-environment audience in Lima, Peru from March 17-21, 2014. ECO team members — Patricia Garcia, Samantha Wapnick, Kumiko Murata and Claire Schleiffer — prepared for, facilitated and conducted M&E for the course.

The course had the following objectives:

1. Articulate how climate change relates to development work in multiple sectors and help others to make these connections.
2. Understand the concepts of climate change adaptation and low emission development strategies, and how projects and programs in different sectors can contribute to them.
3. Describe USAID's Global Climate Change (GCC) funding pillars' goals and activities (Adaptation, Clean Energy, Sustainable Landscapes), and how projects and programs can contribute to global climate change objectives regardless of their funding type.
4. Identify and take next steps to integrate climate change into one's own work and the breadth of the work of each mission.

The ECO team provided content, design and adult learning support for six sessions on various topics. This included coordinating with nine presenters and providing guidance and quality assurance/control for designing, developing and delivering the sessions. It also revised activities and developed new discussion sessions and activities. Leading up to and during the course, the ECO team also tracked registration data, logistics, did “dry runs” for remote presentations and formatted and printed materials. Kumiko Murata and Claire Schleiffer also coordinated with USAID GCC Training Lead Jennifer Kane and other USAID trainers to compile revised and finalized session slides for the full five-day course.

Patricia Garcia was the lead course facilitator and Samantha Wapnick facilitated group activities and delivered some technical sessions.

As part of the adult learning and content management support for the course, the ECO team worked closely with the course lead (Jenny Kane), led and contributed to trainers' meetings and adaptive content revision, tracked attendance, timed sessions and performed other logistical and facilitation-related matters. After the course, ECO led the archiving of all training materials “as delivered,” data entry and analysis of course evaluations, and facilitation of the After Action Review (AAR). Participants and trainers alike deemed the Peru GCC training a success and most evaluation responses showed very high scores, particularly regarding it having achieved its learning objectives.

## **IMPLEMENTATION ISSUES OR PROBLEMS**

1. Due to the rapid and multiple revisions made during the final days leading up to the course delivery, and the email-based coordination between USAID trainers and ECO team members, some final revisions were not found in the final slide deck upon arrival in Peru.
2. Despite conducting multiple “dry runs” leading up to and during the course week, technical issues were a problem for two remote sessions. In one session, this resulted in lost time and in the end, with a connection failure, ultimately prevented the remote presenter from delivering her session. Technical glitches for the second presentation were resolved in time for the presentation and it was well-received by participants.

## **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

1. ECO team members were quick to rectify/update the missing revisions in the slide deck as soon as they were flagged. ECO and USAID training team members agreed in the AAR that coordinating via email and with multiple cloud platforms for file-sharing posed challenges for version control and tracking, and have agreed on a simplified process for future training activities, in addition to more stringent advance deadlines for final content revisions.
2. Because ECO GCC Specialist Samantha Wapnick was very familiar with the subject of the first remote session, she continued to deliver her remarks when the connection fell through and participants received the important content.

## **ACTIVITY 1.2.2: GCC KSA DEVELOPMENT PROCESS**

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### **SIGNIFICANT ACCOMPLISHMENTS**

As part of the LNA process, the ECO team integrated the KSAs methodology with the overall data collection process. As part of this process, it conducted 16 interviews and 5 focus groups. These generated specific data about the knowledge, skills and abilities required to program GCC funds or integrate GCC considerations into programming for other sectors. As of the writing of this report, the GCC training leader and ECO team members are developing the KSAs.

### **IMPLEMENTATION ISSUES OR PROBLEMS**

None

### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

None

## **ACTIVITY 1.2.3 GCC JULY COURSES**

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### **SIGNIFICANT ACCOMPLISHMENTS**

This activity has not started yet. However the delivery of the GCC Training in Peru provided important lessons learned for the development and delivery of the GCC Training in July.

### **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A

## **1.3 FAB TRAINING ACTIVITIES**

### **ACTIVITY 1.3.1: FAB ENVIRONMENTAL MATTERS SHORT COURSE**

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#### **SIGNIFICANT ACCOMPLISHMENTS**

This activity has not started yet. The team decided to hold the programming of the Environment Matters Course until the LNA Data Collection was completed. As of the writing of this report, an Environment Matters course will be programmed for early June, 2014.

#### **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

#### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A

## **1.4 WATER TRAINING ACTIVITIES**

### **ACTIVITY 1.4.1: WATER COMPETENCIES FINALIZATION**

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#### **SIGNIFICANT ACCOMPLISHMENTS**

This activity has been put on hold given the changes in staffing at the Water Office. A new point of contact has been identified in office and the ECO team will follow up to discuss the process for this activity.

#### **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

## **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A

## **1.5 URBAN OFFICE TRAINING ACTIVITIES**

### **ACTIVITY 1.5.1: URBAN POLICY E-LEARNING PRIMER**

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#### **SIGNIFICANT ACCOMPLISHMENTS**

Meredith Ferris, the ECO Activity Manager, collected and compiled contributions from key USAID staff to develop a draft of the online urban primer. USAID content specialists and target audience representatives participated in beta testing beginning on March 31.

#### **IMPLEMENTATION ISSUES OR PROBLEMS**

The timing of the module development and scheduling caused delays in the agreed upon schedule in early 2014. Some technological issues were experienced in the development of the online module. USAID University staff members were overstretched and this delayed their ability to upload the program into the pilot test site and set up participant accounts. The USAID University system is experiencing glitches, particularly with online learning modules.

#### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

The schedule for development and delivery has been revised and internal technology issues have been managed with updating of software and hardware cables. Both the USAID activity manager and ECO activity manager are going to continue to work closely with USAID University staff to understand any system glitches and agree on the timing for the final course to be uploaded and opened to USAID staff.

## **TASK 2: KNOWLEDGE MANAGEMENT IMPLEMENTATION**

## **2.1 LTRM KNOWLEDGE MANAGEMENT ACTIVITIES**

### **ACTIVITY 2.1.1 STOCKTAKING GUIDE LAUNCH EVENT**

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### **ACTIVITY 2.1.3 NWP2 LAUNCH EVENT**

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### **ACTIVITY 2.1.3 CBNRM LAUNCH EVENT**

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\*These activities are reported on in Section 3- Communications and Reporting

## 2.3 FORESTRY AND BIODIVERSITY KNOWLEDGE MANAGEMENT ACTIVITIES

### ACTIVITY 2.3.1 ACTIVITY BIODIVERSITY HANDBOOK PEER REVIEW SESSIONS

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#### SIGNIFICANT ACCOMPLISHMENTS

ECO team member, Meredith Ferris provided facilitation support for a two hour conference call to gather feedback on draft Chapter 3 of the Biodiversity Handbook from internal and external USAID experts. This activity was completed and notes were sent to the USAID Activity Manger.

#### IMPLEMENTATION ISSUES OR PROBLEMS

N/A

#### APPROACHES TO ADDRESS ISSUES OR PROBLEMS

N/A

## 2.4 INTEGRATED KNOWLEDGE MANAGEMENT ACTIVITIES

### ACTIVITY 2.4.1 ECO BRAND DEVELOPMENT

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#### SIGNIFICANT ACCOMPLISHMENTS

ECO's graphic designer, Daniel Ferro, created the design elements for the ECO brand, including a logo, fonts, and color scheme. The logo was developed according to USAID branding guidelines.

#### IMPLEMENTATION ISSUES OR PROBLEMS

The initial logo design took longer than expected due to multiple revisions. ECO started to develop various document templates using the ECO brand, including a memo/Word template, presentation template and a general style guide for the web or print, but has put this work on hold until more LOE is approved for this activity.

#### APPROACHES TO ADDRESS ISSUES OR PROBLEMS

ECO plans to submit a request for additional time to complete this work and also plans to schedule a meeting with the ECO COR to discuss branding of ECO in general to further inform which templates need to be created.

## **ACTIVITY 2.4.2 ECO LINKS SERIES STRATEGY DEVELOPMENT AND IMPLEMENTATION**

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### **SIGNIFICANT ACCOMPLISHMENTS**

While this activity is on hold until the ECO COR has time to participate in a series of strategy development meetings, the development of the draft KM strategy paper as part of the LNA process and the lessons learned from the NWP launch will inform our approach to the ECO Links series.

### **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A

## **ACTIVITY 2.4.3 FRAME WEB GENERAL ADMINISTRATION (COMMUNITY OF PRACTICE MODERATOR)**

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### **SIGNIFICANT ACCOMPLISHMENTS**

Okey Nwoke, ECO's interim FRAMEweb administrator, is successfully managing this site. Okey ensures that the communities have the technical support they need and all requests for membership are accepted in a timely manner. During this period, Frameweb was successfully used to share the Stocktagging Guide and the NWP2 report. In addition, a relationship was developed with Newsgator (the company that supports the software) and technical difficulties experienced were rapidly fixed.

### **IMPLEMENTATION ISSUES OR PROBLEMS**

No formal handoff or training on the administration of FRAMEweb occurred. Key information and materials from the previous contract were given to ECO late and in a sporadic fashion. In addition, ECO still needs to identify a provider for the backend IT support needed to manage FRAMEweb.

### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

ECO reached out to the previous FRAMEweb administrator for guidance and information when needed. Also, ECO is in conversations with Newsgator about setting up a contract with it to provide this backend IT support.

## **ACTIVITY 2.4.4 ECO MASTER CONTACT DATABASE**

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### **SIGNIFICANT ACCOMPLISHMENTS**

ECO created two contact databases during this period (the LNA survey participant database and the NWP participant) that will serve as the initial components of the ECO Master Contact Database.

### **IMPLEMENTATION ISSUES OR PROBLEMS**

ECO needs further guidance on the vision and utilization of the database before moving forward with establishing the infrastructure for it.

## **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

ECO plans to set up a meeting with the COR to discuss the vision and utilization of the database and then will set up a full scope and budget for this activity in order to begin constructing the actual database that will be used for the life of the project.

## TASK 3: COMMUNICATIONS AND REPORTING IMPLEMENTATION

### 3.1 LTRM COMMUNICATIONS AND REPORTING ACTIVITIES

#### ACTIVITY 3.1.1 STOCKTAKING GUIDE LAUNCH EVENT

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##### SIGNIFICANT ACCOMPLISHMENTS

Planning and scoping of this event is awaiting additional guidance and direction from the LTRM activity manager.

##### IMPLEMENTATION ISSUES OR PROBLEMS

N/A

##### APPROACHES TO ADDRESS ISSUES OR PROBLEMS

N/A

#### ACTIVITY 3.1.2 NWP2 LAUNCH EVENT

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##### SIGNIFICANT ACCOMPLISHMENTS

On January 27, 2014, ECO team members Duane Muller, Laurie Segel-Moss and Scott Loomis worked with the LTRM Activity Manager to organize the first in a series of ECOLinks events, with the launch of Nature, Wealth and Power 2.0 (NWP2) featuring an in-person event at USAID and simultaneous webinar. The webinar was hosted by ECO's webinar facilitator, Dar Maxwell, and ECO's webinar producer, Adrian Gaskin. Both events highlighted the findings of the NWP2 report "Leveraging Natural and Social Capital for Resilient Development" and discussed future implications. High-level speakers included Nancy Sutley (Chair, Council on Environmental Quality), Asif Shaikh (Senior Adviser, Center for Strategic and International Studies), Eric Postel (Assistant Administrator, USAID/E3 Bureau) and Franklin Moore (Deputy Assistant Administrator, USAID/Bureau for Africa). ECO managed the event logistics, including invitations, registration and organization. More than 70 participants from 33 countries participated in the online webcast, while over 100 participants attended the event in person. The majority of participants (74%) surveyed said they were either "very satisfied" or "extremely satisfied" with this event.

The NWP2 report was posted on FRAMEweb, along with summaries in English, French and Spanish. A transcription of the webinar and a Voice-Over PowerPoint, were also posted to FRAMEweb as part of this activity.

A new group workspace on the RM Portal (<http://rmportal.net/groups/nwp/>) will be used to share and discuss NWP principles, actions and cases cited in the report, along with related resources. The ECO team also held an after action review to highlight lessons learned to guide future ECOLinks events.

## **IMPLEMENTATION ISSUES OR PROBLEMS**

The majority of significant issues encountered stemmed from the short lead time, about 10 days, to plan and execute the event. The main issue was cost increases (room rental, catering fees, printing, etc.) incurred due to the shortened period of preparation for the event.

## **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

ECO used surge capacity to arrange all logistics and complete preparation for the event in the short time frame. Factors that elevated costs beyond the initial budget could be mitigated by a longer period of planning before the activity in the future.

## **ACTIVITY 3.1.3 CBNRM LAUNCH EVENT**

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### **SIGNIFICANT ACCOMPLISHMENTS**

Further planning and scoping of this event are awaiting guidance from the LTRM activity manager.

### **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A

## **3.2 GCC COMMUNICATIONS AND REPORTING ACTIVITIES**

### **ACTIVITY 3.2.1 GLOSSY CLIMATE OVERVIEW DOCUMENT/REPORT**

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#### **SIGNIFICANT ACCOMPLISHMENTS**

ECO team members Duane Muller and Kirsten Stade have been working with USAID's GCC office on this activity since December. The GCC Glossy document is expected to convey compelling results from a number of GCC programs and better communicate the results of USAID climate investments in the developing world. Collaboration between the two partners has yielded several case stories for this overview report, which is expected to be about 20 pages. Extensive research and interviews have taken place with USAID staff to fact check data and results. Once stories have been finalized (in mid-April), additional ECO support will include copy editing, photo selection, layout, graphic design, 508 compliance and printing in the April/May timeframe. The goal is to produce the final report by mid-May, in time for the USAID Mission Directors Conference.

## **IMPLEMENTATION ISSUES OR PROBLEMS**

There have been some significant delays on this activity due to a number of factors. First, the roles and responsibilities have evolved since this activity began. ECO's role expanded to include drafting stories, assisting with modifying the approach to developing stories, commenting on the introduction and connecting copy as well as undertaking extensive research and interviews with USAID staff. As a result, significant time and LOE have been incurred thus far.

## **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

These issues have been addressed through work plan amendments and close communication with the GCC Office. As a new ECO GCC communications activity, both USAID and ECO are learning more about writing styles and approaches that will hopefully allow a smooth transition to a final document in mid-May.

## **ACTIVITY 3.2.2 GCC COMMUNICATIONS/KM STRATEGY DEVELOPMENT**

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### **SIGNIFICANT ACCOMPLISHMENTS**

After several meetings and consultations with members of the GCC Office, ECO team members Duane Muller and Meredith Ferris submitted the required deliverables under this activity at the end of February to USAID. These included a comprehensive narrative work plan, an accompanying budget and an audience map. ECO also provided comments on an overall messaging document in early March. The ECO staff has amended the audience map per USAID feedback, and also amended the work plan/budget to address resource concerns.

### **IMPLEMENTATION ISSUES OR PROBLEMS**

There was a delay in getting the work plan/budget reviewed by GCC Management, thus causing a delayed start date.

### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

Assuming USAID/GCC approval, ECO is working to modify the production schedule given the delayed start.

## **ACTIVITY 3.2.3 GCC PFAN INFOGRAPHIC**

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### **SIGNIFICANT ACCOMPLISHMENTS**

ECO recently received the PFAN data and key messages for the infographic from USAID. ECO is reviewing this data and is in the initial stages of drafting the first iteration of this graphic. A final infographic will be ready by late April.

## **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

## **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A

## **3.3 FORESTRY AND BIODIVERSITY COMMUNICATIONS AND REPORTING ACTIVITIES**

### **ACTIVITY 3.3.1 BIODIVERSITY POLICY & 2-PAGER**

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#### **SIGNIFICANT ACCOMPLISHMENTS**

The ECO team provided assistance with finalizing the Biodiversity Policy, including: photo selection/identification, an acronym list, layout and copy editing. The Biodiversity Policy has been formatted and put into 508 compliance and released internally. ECO is awaiting further instructions and guidance from USAID regarding the 2-pager, as well as additional edits to the Policy document, which may include a factual error, as well as potential printing.

#### **IMPLEMENTATION ISSUES OR PROBLEMS**

The photo selection, layout and copyediting process was longer and much more time intensive than anticipated. As a result, the project encountered several challenges related to delays and LOE constraints.

#### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

The ECO team would welcome a brief after action review with USAID to identify lessons learned and ensure improvements on future communication activities.

### **ACTIVITY 3.3.2 BIODIVERSITY HANDBOOK**

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#### **SIGNIFICANT ACCOMPLISHMENTS**

None to date. ECO is currently awaiting further instruction and guidance from the Forestry and Biodiversity office on this activity.

#### **IMPLEMENTATION ISSUES OR PROBLEMS**

ECO has held several scoping conversations with the FAB office about this activity but due to delays in finalizing the content of the handbook and shifting visions on how to produce it, ECO has not been able to start any work on this activity.

## **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

A meeting to discuss again is scheduled on April 18, 2014.

## **ACTIVITY 3.3.3 BIODIVERSITY POLICY LAUNCH EVENT(S)**

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### **SIGNIFICANT ACCOMPLISHMENTS**

An initial scoping conversation about ideas and goals for this event was held at the end of March, and ECO is awaiting further guidance from USAID on ECO's role on this event, tentatively scheduled for June.

### **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A

## **ACTIVITY 3.3.4 COMMUNICATIONS, MARKETING AND AUDIENCE RESEARCH FOR TECH CHALLENGE ON WILDLIFE TRAFFICKING**

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### **SIGNIFICANT ACCOMPLISHMENTS**

ECO is awaiting guidance and instructions from USAID for this project.

### **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A

## **TASK 4: FACILITATION IMPLEMENTATION**

### **4.3 FAB FACILITATION ACTIVITIES**

#### **ACTIVITY 4.3.1 SCAPES QUARTERLY MEETING SUPPORT**

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##### **SIGNIFICANT ACCOMPLISHMENTS**

Lauren Doll, an ECO Project Associate, provided logistical support and note-taking for two SCAPES quarterly meetings – December 16, 2013 and March 12, 2014. For each meeting, a write-up of the summary notes was provided to the SCAPES point of contact in FAB.

##### **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

##### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A

#### **ACTIVITY 4.3.2 FAB JANUARY 2014 RETREAT**

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##### **SIGNIFICANT ACCOMPLISHMENTS**

ECO team members Meredith Ferris and Lauren Doll provided agenda setting, facilitation and note taking support to the FAB Office for a 3-day retreat in January 2014. Prior to the meeting, a survey was developed to help the FAB Office Director and managers gauge staff perception on FAB's accomplishments and areas for improvement related to critical Office activities and to help prioritize topics for discussion in the retreat. The objectives of the retreat were to:

- Understand and articulate the implications of the Biodiversity Policy in a variety of scenarios
- Review the FAB Office results framework and prioritize goals for 2014.
- Review and discuss the current FAB Office portfolio
- Brainstorm ideas for the Policy launch and identify any additional steps as we begin implementation.
- Check in on FAB Office knowledge management.

##### **IMPLEMENTATION ISSUES OR PROBLEMS**

It was noted that Office staff who had also participated in a training event before the retreat felt that too much time was spent outside the office. The Office Director also noted that retreat planning was too rushed and would have benefited from more staff engagement on the agenda.

### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

For the FAB mid-year retreat in July, the Office Director and facilitator will begin scheduling and planning in April/May. Also, the facilitator suggested the Office consider forming a retreat steering committee to help with agenda setting and buy-in for the event.

### **ACTIVITY 4.3.3 SCAPES ANNUAL MEETING**

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#### **SIGNIFICANT ACCOMPLISHMENTS**

Claire Schleiffer, one of ECO's PAs, worked with the USAID Activity manager to research, identify and select a site for the Annual meeting. The ECO team is in the early stages of logistics coordination, including sending invitations to participants, setting up travel arrangements, catering, rooms and meeting space. Meredith Ferris has been identified as the meeting's facilitator. Meredith is beginning to engage with FAB Office staff to develop the agenda.

#### **IMPLEMENTATION ISSUES OR PROBLEMS**

ECO still has not received details about the participants. This has held up the development of the budget for this activity.

#### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

ECO is working with the USAID Activity Manager to estimate participant travel and accommodation needs using data from last year's participant list.

### **ACTIVITY 4.3.4 SCAPES LEARNING PROGRAM ASSESSMENT**

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#### **SIGNIFICANT ACCOMPLISHMENTS**

The learning assessment facilitator met with the USAID task manager to review the objectives of this task and to develop a focus group/interview protocol and process for this activity. A focus group of key SCAPES partner points of contact was conducted and ECO is in the process of scheduling more interviews with key USAID FAB Office staff and other partners.

#### **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

#### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A

## 4.4 WATER FACILITATION ACTIVITIES

### ACTIVITY 4.4.1 WATER OFFICE RETREAT

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#### SIGNIFICANT ACCOMPLISHMENTS

The office of water held its retreat on March 12-13, 2014. ECO team members - Helen Petrozzola, Lisa Howard-Grabman, and Claire Schleiffer – helped prepare for, facilitate and document the two-day session. The retreat had the following objectives:

- Clarify Office mission and role in relation to the strategy (and beyond)
- Determine key actions to be taken to leverage strengths, overcome weaknesses, capitalize on opportunities and prevent threats from impeding the team's work
- Review workload and identify the most appropriate allocation of staff time
- Understand own and others' MBTI type and the relationship to working on a team
- Explore different methods of decision making and apply them to an agreement of team norms for the office and team-identified topics

The participants conducted a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis for the first two objectives and then reviewed and discussed their individual workloads. The MBTI was used as a tool to help understand individual preferences and how they impact office functioning. Finally, a decision-making model was introduced to help the office move ahead on vexing issues.

#### IMPLEMENTATION ISSUES OR PROBLEMS

The dates of the retreat kept changing.

#### APPROACHES TO ADDRESS ISSUES OR PROBLEMS

The facilitator team remained flexible as much as possible to accommodate the most appropriate dates.

# PERFORMANCE MONITORING PLAN DEVELOPMENT

## PROJECT MANAGEMENT AND PLANNING

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### SIGNIFICANT ACCOMPLISHMENTS

The ECO project is highly complex, involving the environment and natural resources management and global climate change sectors of the E3 Bureau and four different task areas. The intent of the contract is to provide quality support for all four of the tasks, while seeking synergies across these areas and across the four offices involved. Not surprisingly, it has required developing strong project management systems to support all aspects of the program. In the case of ECO, there are at least four USAID offices involved, thus underscoring the need for effective communications and information sharing systems and protocols. Over the first six months of the project, the ECO staff has held regular internal meetings and initiated contacts with USAID staff on the management council and the respective technical teams. The project team has set up Basecamp as a web-based platform for sharing documents, schedules and tasks. The project management team has been created is continuing to refine information sharing. Management systems have been created, including a task tracker, monitoring of LOE and costs by office and task and processes to meet other administrative needs.

As part of the ongoing discovery process and growing need for communications and knowledge management, the ECO management re-conceptualized the staffing plan. Based on a greater need for communications and reporting than initially anticipated, ECO has formed a more robust team. For now, it is being led by a consultant, the Senior Communications Advisor. The team currently has the following members:

- Full-time communications writer/specialist
- Part-time communications writer/specialist
- Part-time Project Associate to provide logistic and registration support for communications events, basic graphic design and layout and other support, as needed.
- STTA:
  - Advanced graphics/infographics/publication support staff
  - Additional capacity in the form of current ECO team members and external consultants with communications/information expertise and event planning experience.

It is envisioned that this team of writers will serve all ECO offices, but also be a core part of the GCC communications effort and support its high demand for written content. They will produce at least three GCC products per month as well as develop content for the other offices as needed. Ideally, the writers will collect story content, contribute material for publications and create print and web content for all offices as needed.

In a similar fashion we have begun forming a knowledge management team that will support training and communications. The current Senior C/KM Specialist is leading the team and it will eventually have the following members:

- Full-time online community and social media manager (e.g. FRAMEWeb)
- Part-time PA to provide registration, database, logistics, and evaluation support
  - STTA (webinar producer/facilitator and web development/revision support)

## **IMPLEMENTATION ISSUES OR PROBLEMS**

While having a collaborative approach with USAID is essential, the number of meetings to discuss the scope of future activities has been greater than anticipated. This has resulted in a greater expenditure of project management time. It has also taken longer to hire a full-time community and social media manager than anticipated.

## **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

We have embedded more planning and scoping time to help redistribute project management hours more directly to specific activities. We have also created Task Management charge codes that will allow us to budget for and track the following types of activities by task area and office:

- scoping conversations for new activities
- developing systems for overall office/task processes
- coordinating and conceptualizing for specific office/task areas

The ECO team has increased its efforts to spread a wider recruitment net for potential candidates and redoubled its recruiting efforts for the community manager. We are also looking at initiating KM-related activities under FrameWeb using the interim community manager and the part-time PA.

## **PROJECT MONITORING AND EVALUATION**

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### **SIGNIFICANT ACCOMPLISHMENTS**

The ECO team has engaged in initial conversations about articulating the theory of change for the program and developing a draft results framework that can serve as the basis for establishing a progressive monitoring and evaluation system. The M&E system will need to accommodate an adaptive learning approach as a key feature.

### **IMPLEMENTATION ISSUES OR PROBLEMS**

N/A

### **APPROACHES TO ADDRESS ISSUES OR PROBLEMS**

N/A